Software for Realizing Care's Potential

# RHODE ISLAND EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES (EOHHS): PERSON CENTERED OPTIONS COUNSELING (PCOC)

## WELLSKY TRAINING GUIDE

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1-855-WELLSKY

WellSky.com

**No PHI was used in the creation of this guide.**

## Document Tracking

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# Contents

## Icons Used in this Manual

| Icon | Description |
| --- | --- |
|  | **Tip**<br>Tips provide general recommendations on how to make it easier or more productive to use the Harmony solution. |
|   | **Caution**<br>The Caution icon highlights areas of note or concern, where failure to use the system properly may cause or exacerbate problems. |
|  | **Note**<br>Notes provide additional information of general interest about a specific function or process of the Harmony solution. |
|  | **Example**<br>Examples are provided to help you develop a better understanding of the subject area and how the Harmony solution may be used in a specific scenario of relevance. |

# WELLSKY Basics

WELLSKY is a web-based system that is accessed from a Web browser, specifically Internet Explorer® (IE). Your workstation will be configured before you "go live" to allow the system and all its functionality to operate properly. If you experience any problems during training or after "go live", please coordinate with your System Administrator to evaluate the issue.

## Screen Stacking

In WELLSKY, you will do a lot of opening and closing of screens (windows). As you are working, you can have many screens open and not know because they're stacked on top of each other. There is no harm in this, but it can make working in WELLSKY more cumbersome. Open screens can prevent you from getting to another area of the program. On the other hand, closed screens can also prevent you from moving around.

If a screen has been closed, but should have remained open, you will see an error message similar as this:

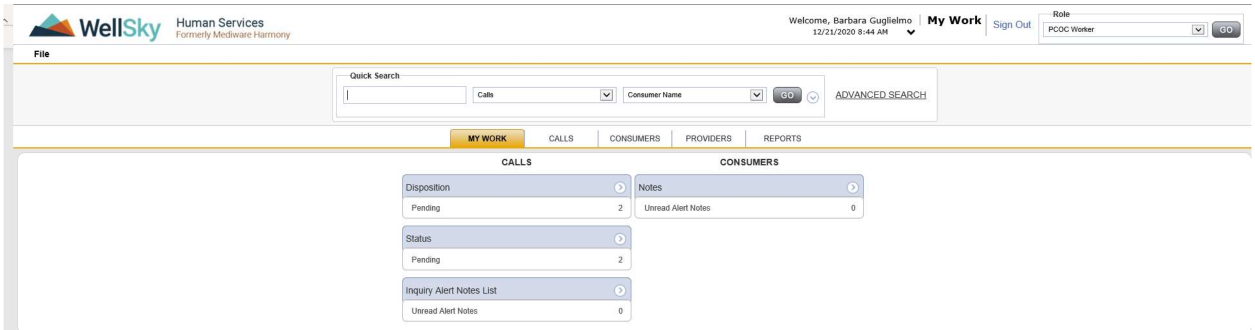
Participant record cannot be saved because the main Call window is closed.

Best Practices recommend that you click **File > Save and Close** when you are saving records. This prevents unnecessary screens from staying open.

## Logging into WELLSKY

Your WELLSKY Application Administrator will provide you with the URL (Internet Address) and your login credentials for both the Sandbox Environment and Live system when appropriate.

1. Open Internet Explorer and then enter the URL for WELLSKY.
2. At the login, type your **User ID** and **Password.**
3. Click **Login.**
    a. The **My Work Dashboard** is displayed.



My Work Dashboard

## Exit WELLSKY

To exit WELLSKY:

1. In the upper right portion of the screen, click **Sign Out.**

Sign Out

## WELLSKY Password Guidelines

When changing your password, keep the following guidelines in mind.
Typical Password Guidelines:

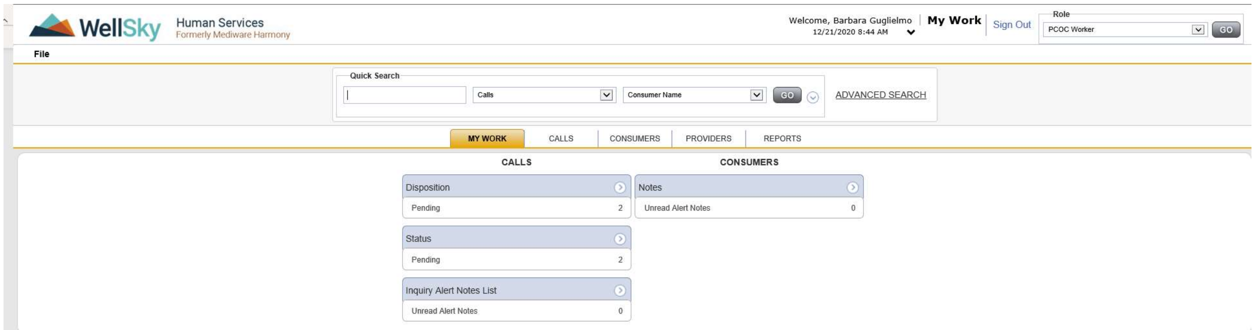
- Must be at least 8 characters
- Include at least 1 lower case letter (a-z)
- Include at least 1 special character (!, #, $, %, etc.)
- Cannot be reused
- Expires after 60 days
- You are allowed 3 unsuccessful login attempts, and then you will be locked out of your account.

## My Work

The My Work chapter displays an overall view of information specific to your work and tasks. Your username and role (as configured by the system administrator) appear on top of the page in the header bar.

The My Work chapter groups data in the following sections:

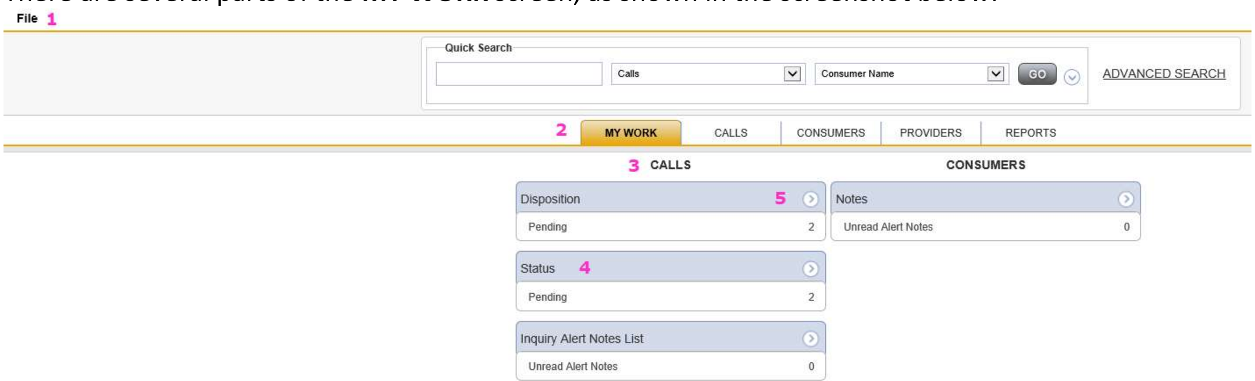
- Calls
- Consumers




My Work Dashboard

## My Work Screen Elements

There are several parts of the **MY WORK** screen, as shown in the screenshot below:



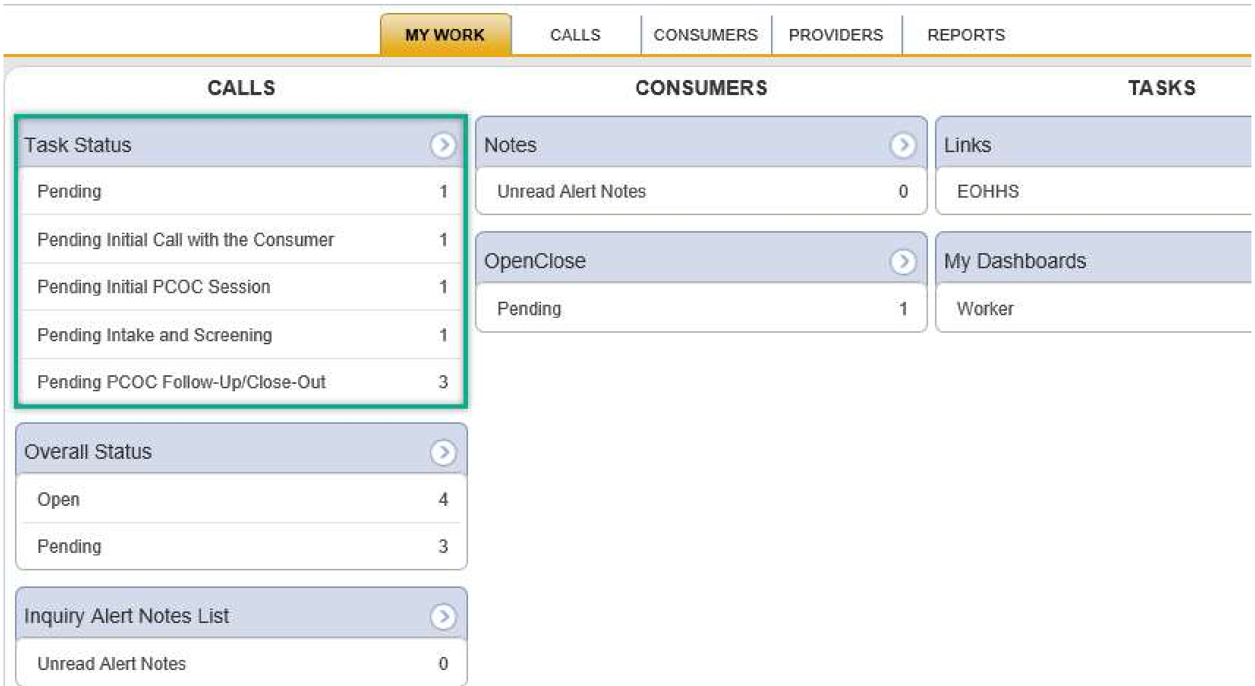

My Work Dashboard

1. The File menu is located throughout the program. Items on the File menu vary, depending on what you are doing. One of the more common functions you'll use is the **File > Add Notes** and **File > Save and Close Notes**.
2. The tabs along the top of the screen are called **Chapters**. A chapter is like a section of the program. To move to another chapter, just click it.  If you have the "UTILITIES" Chapter, let your supervisor know immediately.  This chapter is reserved for IT.
3. **MY WORK** is divided into areas for calls and consumers. You may see all or just some of these areas.
4. Within each area are boxes that contain information. These are referred to as **Panes**. Each pane includes a right facing arrow. When you click the arrow, items in the pane
5. are collapsed. This is helpful if you need more space on your screen. To expand the items in the pane, click the now right-facing arrow.

Many areas of the program allow you to collapse sections (panels). Click the down arrow in the circle . When you click it, it becomes a right-facing arrow 

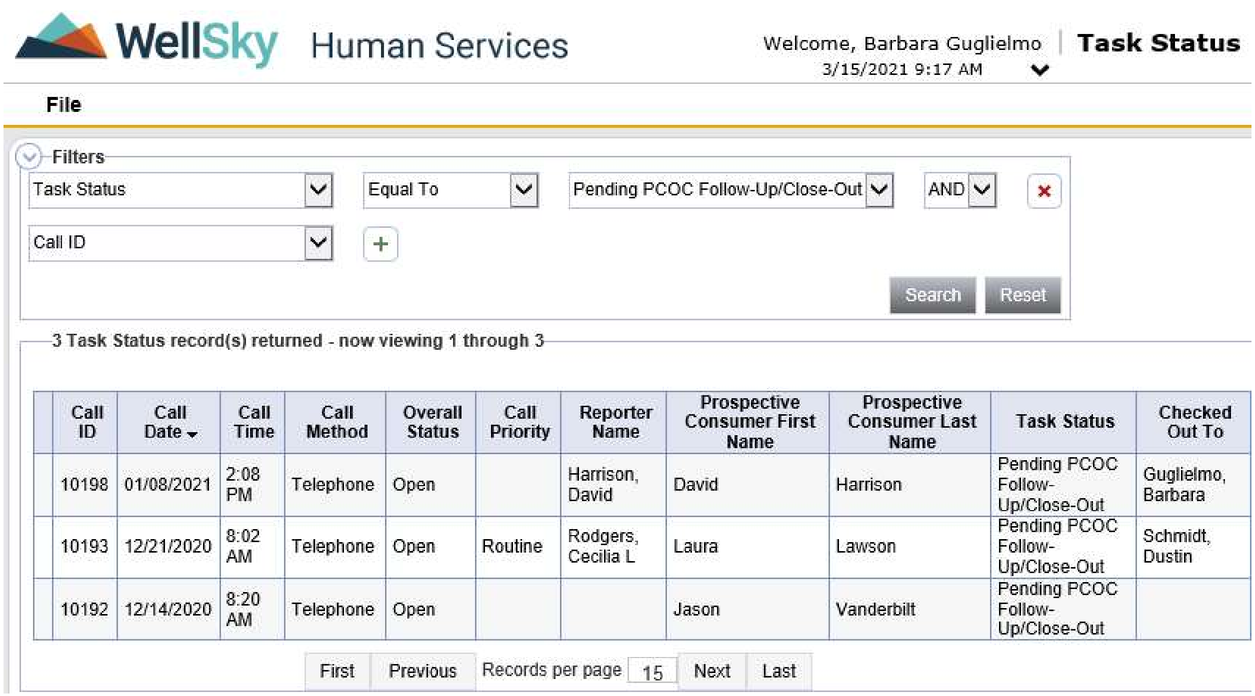
## My Work Panes

Within each Pane on the My Work homepage, numbers will be visible next to different items. These numbers represent the number of activities that exist for that topic. For example, in the screenshot below, one can see that there are three calls with Task Status equal to Pending PCOC Follow-Up/Close-Out.




My Work>Calls Pane

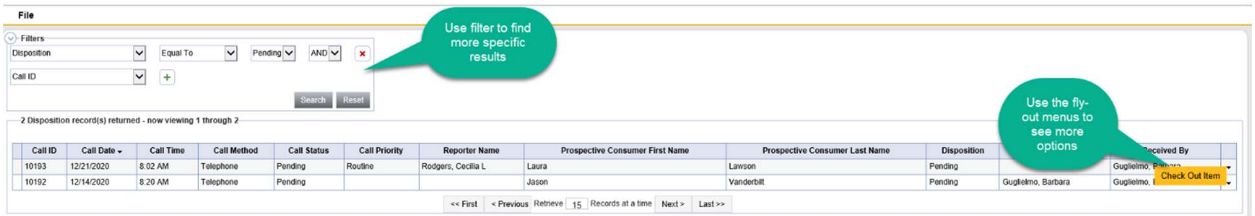
1. To display the pending call records, click anywhere in the row, as highlighted in the screenshot above.




| Call ID | Call Date | Call Time | Call Method | Overall Status | Call Priority | Reporter Name | Prospective Consumer First Name | Prospective Consumer Last Name | Task Status | Checked Out To |
|---|---|---|---|---|---|---|---|---|---|---|
| 10198 | 01/08/2021 | 2:08 PM | Telephone | Open | | Harrison, David | David | Harrison | Pending PCOC Follow-Up/Close-Out | Guglielmo, Barbara |
| 10193 | 12/21/2020 | 8:02 AM | Telephone | Open | Routine | Rodgers, Cecilia L | Laura | Lawson | Pending PCOC Follow-Up/Close-Out | Schmidt, Dustin |
| 10192 | 12/14/2020 | 8:20 AM | Telephone | Open | | | Jason | Vanderbilt | Pending PCOC Follow-Up/Close-Out | |

Call Task Status List Grid

2. A list view page opens to show the records. You can filter the results in a list view page to help find the records you need to work with.




Call Task Status List Grid

3. Hover over the fly-out menu at the end of a row to see more options.

### *Pending Ticklers*

The Ticklers pane shows pending ticklers, which represent tasks that must be completed. Workers can select any task and complete it. Once completed, the tickler is removed from the Pending Ticklers list.

### *Unread Notes*

The Unread Notes section of My Work shows notes created by other workers and routed to you. Select the unread note to view it. If a note is routed to a user who doesn't have the My Work Calls sections they will not receive the note, but the note is still visible in the call or consumer record.

### *Alert Notes*

The Alert Notes section of the My Work Calls section shows alert notes routed by other workers. Click on the alert note to view it. If a note is routed to a user who doesn't have the My Work Calls section, they will not receive the note, but the note is still visible in the consumer or provider record.

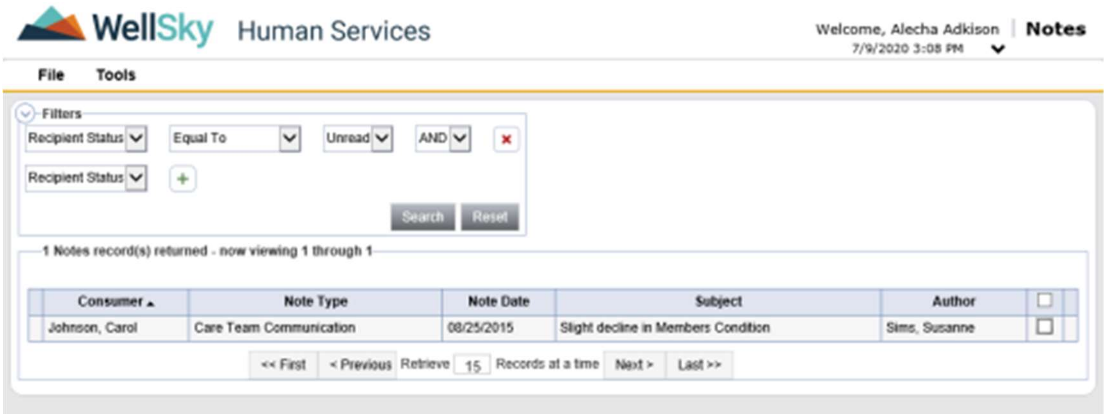
### Opening a note from My Work

When a note is routed to a note recipient, the note will appear in that worker's My Work desktop. Routing a note to another worker is a valuable way to securely share notes relevant to consumers in WellSky Human Services. Notes will be listed in a Notes node on the My Work desktop. A Notes pane may appear in either the Calls or Consumers sections of your My Work desktop.

1. **To open a note from My Work**
2. From the **My Work** dashboard, navigate to the **Notes** node.

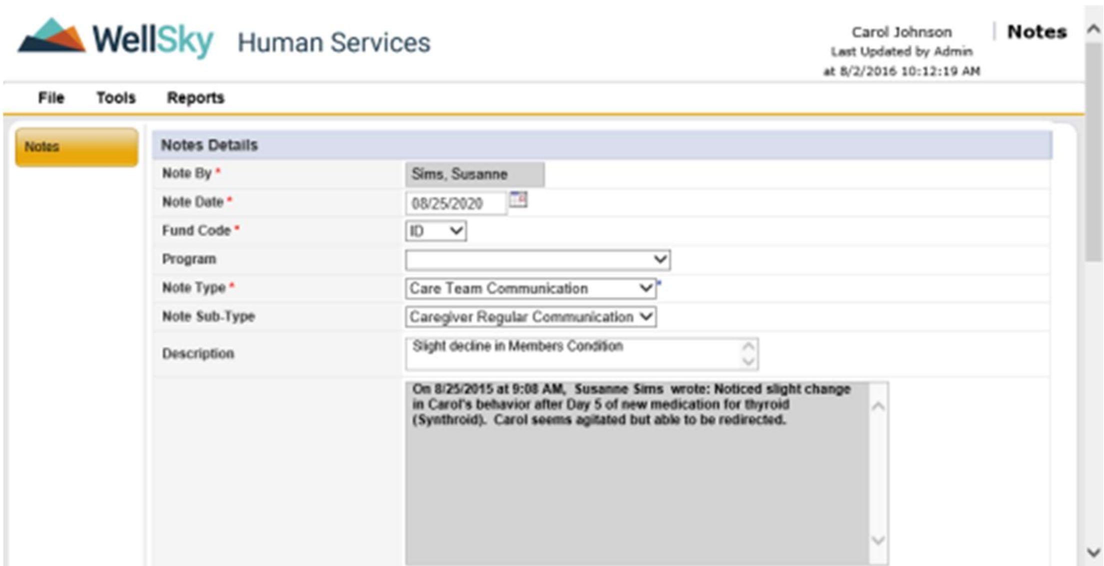

My Work>Notes Pane

3. Select a Notes queue. For example, select the **Unread Alert Notes** queue. The Notes list view page opens.




My Work>Note List Grid

4. Select the note from the list view grid. The Note detail page opens.




Note Details Page

1. From the Notes detail page, you can read and edit the note, add an attachment, and forward it to another worker as a note recipient.
2. WellSky Human Services includes an option in the System Setup utility that allows workers to manually mark a note as read. When this option is active, the note will remain listed in the My Work Notes queue until you mark it as read. To mark a note as read, select **Mark as Read** from the **Tools** menu.
3. To export the note in report format, select **Note Detail** from the **Reports** menu.
4. To close the note, select **Save and Close Notes** from the **File** menu.

### Opening a tickler from My Work

Ticklers are the individual tasks that workers are prompted to complete when an event occurs. Ticklers remind users to complete a screen, fill out a form, or perform some other action. A Ticklers pane may be found in more than one section of My Work. You may see a Ticklers section in the Calls or Consumers sections.

Ticklers are associated with Workflow Wizards (WFWs).

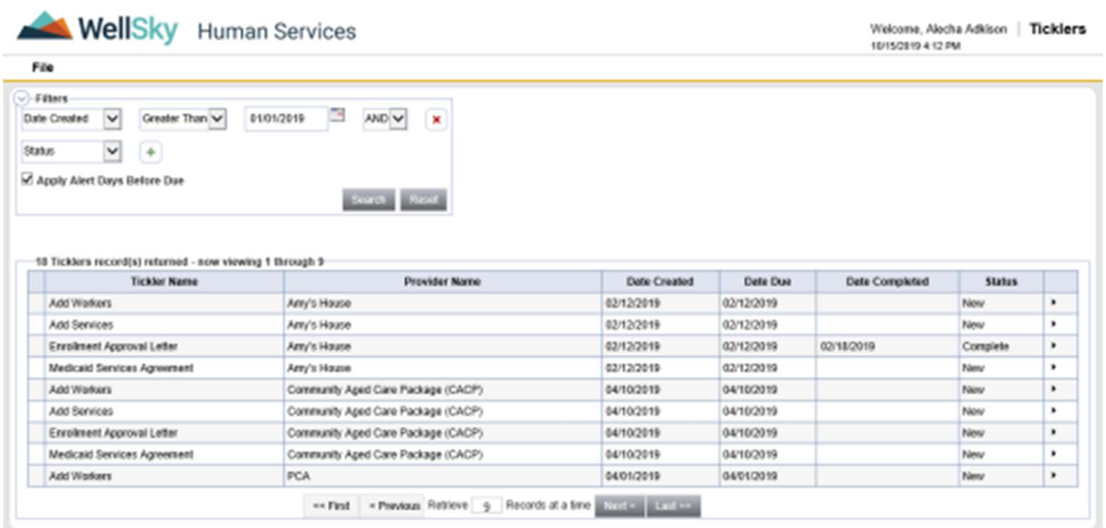
You can also open ticklers from the specific chapter. For example, you can open ticklers from the Consumers chapter.

**To open a tickler from My Work**

1. Click the **Ticklers** link in the section you are working with.


My Work>Ticklers Pane

2. The Ticklers list view page opens. If needed, use the filters to locate the tickler.




My Work>Ticklers List Page

To see a tickler that has a future due date, clear the **Apply Alert Days Before Due** option in the Filters section. Click **Search**.

3. Select the tickler you want to work with from the list view grid. The page that opens will be specific to the tickler. For example, if the tickler name indicates an enrollment letter, the mail merge page will open. If the tickler name indicates adding a worker, the provider's worker page might open.
4. If the tickler is part of a Workflow Wizard, the left-hand navigation area will show the Workflow Wizard step or steps.
5. Complete the task defined in the tickler. Select **Save** from the **File** menu when done.

## Navigating the Application

This section provides a brief overview and some tips for working in the application.

### Chapters

Chapters are links to different areas of WELLSKY.  Authorized users can access chapters at any time by simply clicking the desired Chapter button (or tab) across the top of the screen.  Note that not all workers can see all the listed chapters.

Your view may differ from the example below. (Remember, every Role will have different Chapters. If you have the “UTILITIES” Chapter, let your supervisor know immediately. This chapter is reserved for IT.)


| Chapter | Definition |
|---|---|
| My Work | My Work displays an overall view of information specific to the logged in user. The page provides links to information assigned only to the user along with reporting and user management assignments for quick reference and easy access. |
| Calls | The Calls Chapter is used to record the first reported information necessary for initiating the screening process. All Call records can be accessed in this chapter. |
| Consumers | The Consumers Chapter contains records about Consumers who are receiving services through the Person-Centered Options Counseling Program. |
| Providers | The Providers Chapter contains records of Providers such as Office of Healthy Aging. Provider records may contain information such as Workers, Notes, and Enrollments. |
| Reports | The Reports Chapter provides standard reports on the data contained in the application. |

### File Menu Bar

The **File** menu is displayed throughout the application and is in the upper left corner of the screen. Depending on the screen that’s open, other menus may be displayed. This is the location where you’ll go to create or add files, close and save files and print files, among other functions.

Additional functions remain available under each option. Hovering your cursor above each **File Menu** bar category will expand additional menus. Access to these is granted based on the permissions which are driven by roles. Some examples include and are not limited to: **Save, Save and Close, Print**, and **Add Call**.


WellSky Toolbar

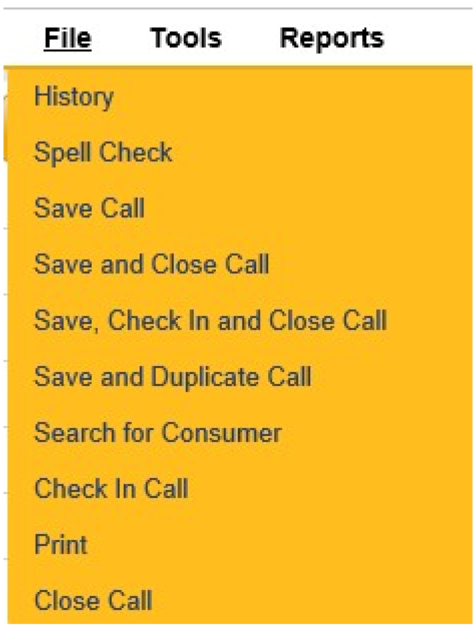
Functions within the **File** menu are consistent for most pages.

When users scroll through a page in WELLSKY, the **File Menu** header is frozen so that users will always be able to access these **File Menu** functions no matter where the cursor is located on the page.

- **File –** Contains the functions to add a new record or to view history changes to the data in view.
- **Edit –** Provides the ability to make changes to the data included in the record.
- **Tools -** Provides the user with additional functionality based on the page currently in view.
- **Reports –** Lists standard reports built into the WellSky software. Additional reports may be available to certain roles or groups. If a user has access to the Reports Menu, click the menu and select the report and it will open in a new window.
- **Ticklers** – Provides the user with a list of "ticklers" or reminders generated for a specific Call record. This menu is only displayed at a chapter level.
- **Word Merge -** Lists documents that have been uploaded to the application using the **Word Merge** Utility and are available to certain roles and groups. If a user has access to the **Word Merge** File menu, to access the document, click the file menu and select the document and it will open a new window.

### Call Records: File Menu

As you are working within a record, you will save and close records. This is done on the **File** menu, located near the top of your screen. The **File** menu options change, depending on what you're doing; the screenshot below displays what the **File** menu might look like.



Example of File menu

The table below describes some of the **File** actions you'll work with as you are creating a call record.

| File Menu | Description |
|---|---|
| History | Allows user view history changes to the data in view. |
| Save | Saves changes since the last save and keeps the record open. Saving a record can be done at any time. |
| Save and Close | Saves changes since the last save and closes the record. |
| Print | Allows user to print the information on the current screen. |
| Delete | Allows user to delete the record permanently. |
| Close | Closes the record without saving any recent changes. |

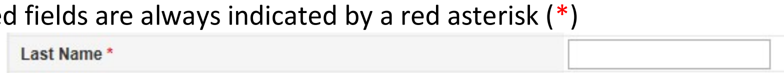
When you need to add, remove, or save files, the **File** menu is the place to go. An example in the directions could appear as: go to **File > Save and Close Notes**. Closing a window by clicking on the "X" in the top right-hand corner of the window is not recommended. Information may be lost.

## Field Formats

There are a few different types of data fields within WellSky, such as text boxes, checkboxes, date fields, dropdowns (sometimes called lookups) and search fields.

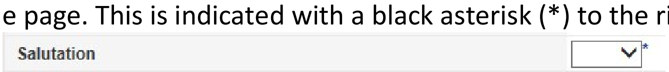
### Required Fields

Required fields are always indicated by a red asterisk (*)




### Fields that affect other fields

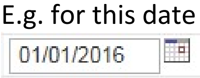
Sometimes choosing a value in one dropdown field will filter or change the values shown in another dropdown field on the same page. This is indicated with a black asterisk (*) to the right of the field.



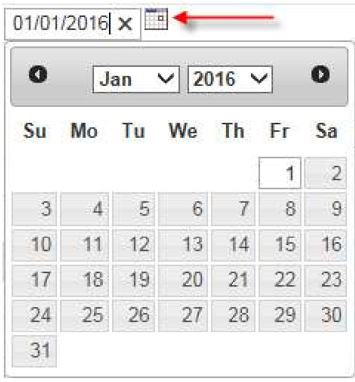

### Date Fields

Date fields can be populated in either of two ways. First, the user can simply type the numbers and WellSky will automatically format the field.

E.g. for this date field, the user typed: 01012016



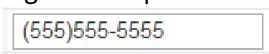

The other option is to click on the calendar icon and use the calendar display. To select a specific date, simply click on the number after the correct month and year are chosen.




### Pre-formatted Fields

Some fields are pre-formatted for certain types of data, most commonly this includes SSN and Phone fields. The user may simply type the numbers and WellSky will automatically add the appropriate formatting such as dashes or brackets.

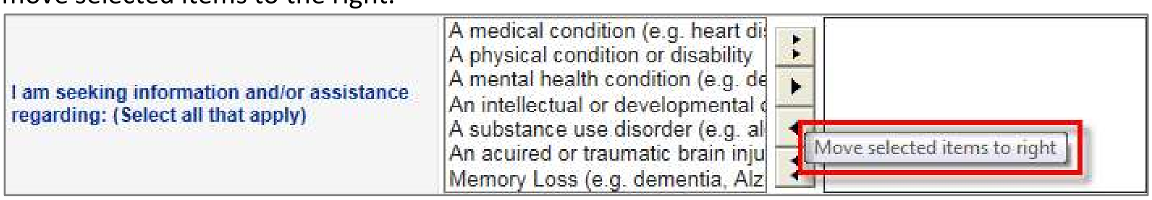
E.g. for this phone field, the user typed: 5555555555




### Multi Select Boxes

#### Using the Arrow Buttons

Some areas of the application require you to select items from a list, and move them from one field to another, using arrow buttons. If you hover over one of the arrow buttons, a tooltip is displayed that describes what the button does. In the screenshot below, the mouse was hovering over the button to move selected items to the right.




Example of a Multi-Select Question

#### Button Definitions

 Move all items from the left to the right

 Move selected items from the left to the right

 Move selected items from the right to the left

 Move all items from the right to the left

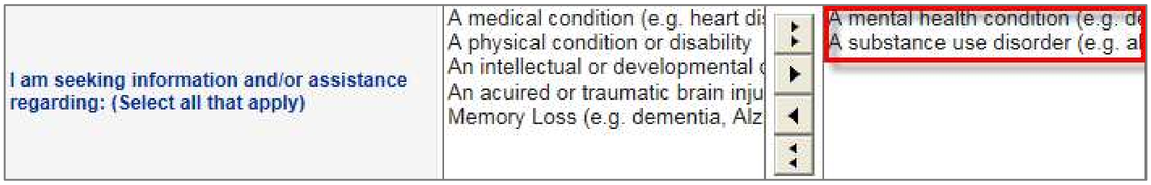
#### Using the Shift and Ctrl keys

If you want to select more than one item, and the items are *all together*, press and hold the **Shift** key on your keyboard and select the first and last records in the group. Then, click the right-facing button to move all items to either the right or left field.

If you want to select more than one item, and the items are *not together*, press and hold the **Ctrl** key on your keyboard and click the records you want. Click the right-facing button to move the items to either the right or left field.

### Example

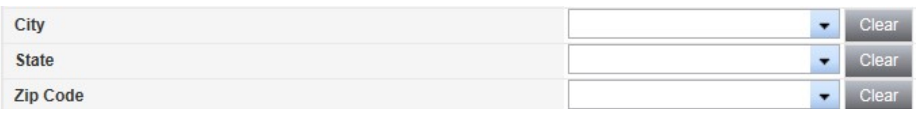
In the screenshot below, the applicant is requesting information on a mental health condition and a substance use disorder. You could either select each item from the left side and click the right-facing arrow to move them to the right or use your **Ctrl** key to select both items at the same time and then click the right-facing arrow.




Example of a Multi-Select Question

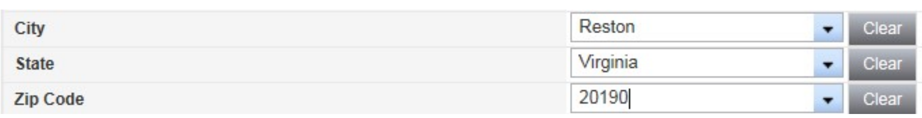
## Places

The Places feature within WellSky allows address fields to be linked together and prefill or filter the options for the linked fields. This also prevents users from selecting incorrect combinations.




Example of Address fields

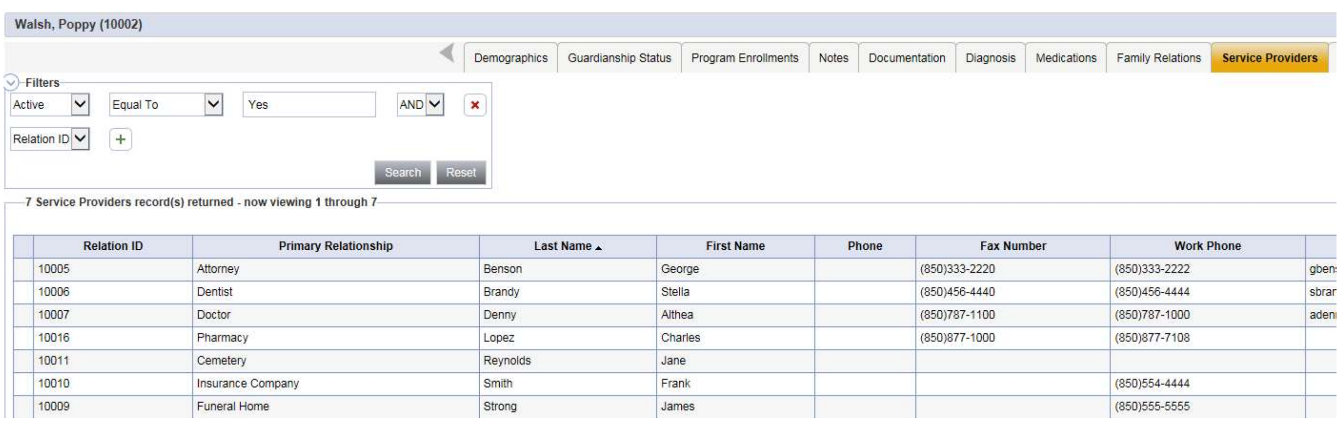
Entering a zip code first, for example, will filter the other fields automatically, and if there is only one option, the other fields will pre-fill. The fields below were all populated simply by entering a zip code of 20190.




Example of Address fields

## List Views and Search Filters

In various areas of WellSky, records may appear in a **List View** screen. These screens limit the number of records returned at one time.




| Relation ID | Primary Relationship | Last Name | First Name | Phone | Fax Number | Work Phone | |
|---|---|---|---|---|---|---|---|
| 10005 | Attorney | Benson | George | | (850)333-2220 | (850)333-2222 | gben |
| 10006 | Dentist | Brandy | Stella | | (850)456-4440 | (850)456-4444 | sbrar |
| 10007 | Doctor | Denny | Althea | | (850)787-1100 | (850)787-1000 | aden |
| 10016 | Pharmacy | Lopez | Charles | | (850)877-1000 | (850)877-7108 | |
| 10011 | Cemetery | Reynolds | Jane | | | | |
| 10010 | Insurance Company | Smith | Frank | | | (850)554-4444 | |
| 10009 | Funeral Home | Strong | James | | | (850)555-5555 | |

Example of a list page

List View screens allow you to quickly retrieve a desired record. If the desired record is not displayed on the initial list view, you can click on one of the following buttons to scroll through the returned records:

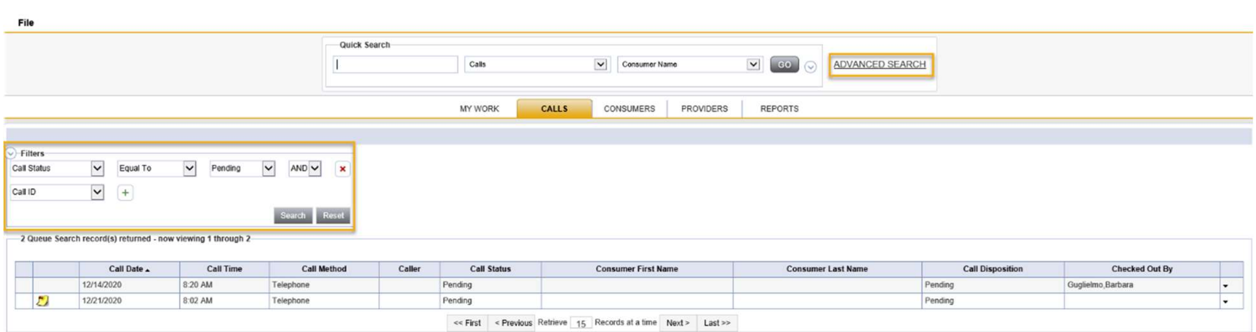
| Button | Description |
|---|---|
| << First | Jumps to the first record in the list |
| < Previous | Jumps button jumps to the previous record in the list |
| Next > | Jumps to the next record in the list |
| Last >> | Jumps to the last record in the list |

**Tip**
You can also modify the number of records returned in the list view by entering the desired number in the "Retrieve [15] records at a time" field and then hitting the Enter key or clicking on one of the record search buttons (i.e., First, Previous, Next, Last).

You may sort the records by ascending or descending order by clicking on the column headers in the list view.

## Advanced Search

The Advanced Search function allows you to look for existing data. There are multiple options and an expanded range of input variables for detailing your criteria to find the records you need.
To search for a Call record using the **Advanced Search** function, take the following steps:




Example of Advanced Search

1. Click the **Advanced Search** link.
   a. The Advanced Search window is displayed.
2. Once you have entered your search criteria in the Filters section, click **Search**.
3. The system displays all items matching the search criteria you defined.

**Note**
You will only be able to see items that are permitted by security settings for your User ID

### Advanced Search Window

Each filter allows you to select from the following comparison search criteria:

| Term | Definition |
|---|---|
| Equal To | Returns records that match the entered criteria. For example, if **<Last Name>** is entered as "equal to" a specific person's name, the Consumer records assigned to that Worker will be returned. |
| Begins With | Returns records that begin with the entered criteria. For example, if **<Last Name>** is entered as "begins with" 'T' the system will return records assigned to the Worker having last names that start with 'T', such as Tester and Thomas. |
| Ends With | Returns records that end with the entered criteria. For example, if you search on **<Last Name>** "ends with" 'r', you can retrieve records where a Consumer's name ends in 'r', such as Tester. |
| Not Equal To | Returns records that do not match the entered criteria. For example, if a particular name is entered for **<Last Name>**, the system will return a list of records except those records for the name provided in the search criteria. |
| Greater Than | Returns records that are dated later than the entered criteria. For example, if **<DOB>** is entered as "greater than" '03/01/2015', the system will return all records with a record whose date of births are after March 1, 2015. |
| Less Than | Returns records that are dated earlier than the entered criteria. For example, if **<DOB>** is entered as "less than" '03/31/2015', the system will return data for all records with a birth date before March 31, 2015. |
| Contains | Returns records that contain the entered criteria. For example, if **<Last Name>** is entered as "contains" specific values in the person's name, the Consumer Record(s) assigned to that worker with those values would be returned. |
| Blank | A record is returned where the selected field does not have a value in the field. |
| Non-Blank | Returns records where the selected field does have a value in the field. |

### Boolean Logic

In addition, you can search on these filters using Boolean (**and/or**) logic:

- **AND** - Tightens your search: Records are returned only if they meet <u>ALL</u> the criteria you entered.

**Example**
Find Consumers where <**DOB**> is greater than (>) March 1, 2000 and <DOB> is less than (<) June 30, 2015. This returns all reports dated between the two dates entered.

- **OR** - Broadens your search: Records are returned if they meet <u>EITHER</u> criteria that you entered:

**Example**
Find records where <**Last Name**> equals <Jones> or <DOB> = "**June 22, 1998**." The system returns records for Jones regardless of date of birth, **and** also returns any consumer records whose birth date is 06/22/2015.

Once you have entered your search criteria, click the **Search** button or you can tab to the **Search** button using your **Tab** key and press **Enter**.

The system displays all items matching the search criteria you defined.

**Note**
You will only be able to see items that are permitted by security settings for your User ID

Did your search return the expected results? If not, click the ***Reset*** button to clear your criteria. Reconsider your filters and try again.

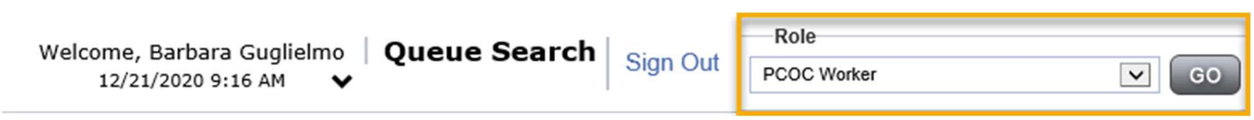
### Switching Roles

Throughout the application, you may use many different Roles. Roles define a set of capabilities or permissions that you have within WELLSKY, and each Role performs different functions. A Role change is indicated by the following symbol and instruction:

Switch Role to **PCOC Worker**

When you switch roles, the following process must be followed:

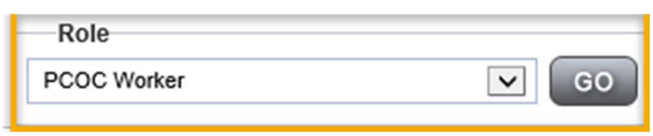
1. Go to the upper-right portion of the screen, in the **Role** field




Role Setting

Role Setting

2. Click the down arrow and then select the **Role** you want to work with.
3. Click **Go**




Role Setting

**Note**
You may not see all the roles as displayed in the dropdown list.

## Using a People Search

Every time you add a person to the database as a participant, the application creates a record in the database people table. A running history of any changes or additions made to the person's participant record is recorded in the people table to help you search to find that person's record in the database.

For example, a participant is added to the database as Cheryl Smith, but she later changes her name to Cheryl Werks. Every time you add a person to the database as a participant, the application creates a record in the database people table. A running history of any changes or additions made to the person's participant record is recorded in the people table to help you search to find that person's record in the database.

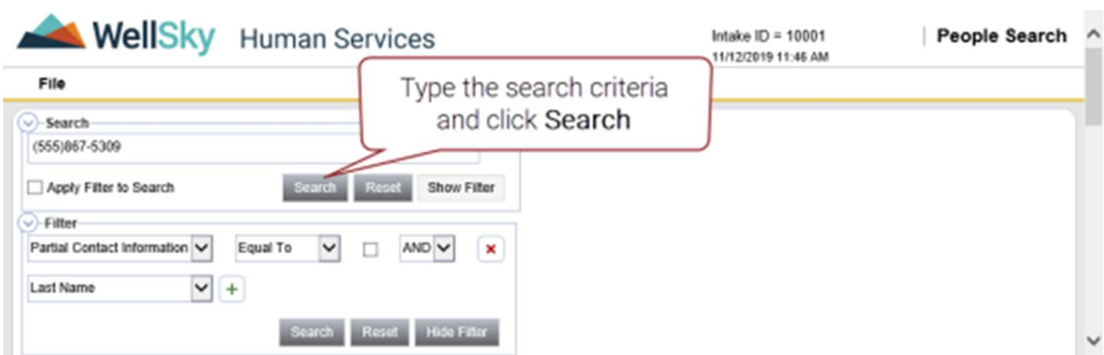
For example, a participant is added to the database as Cheryl Smith, but she later changes her name to Cheryl Werks. Both names are added to the same record in the people table. When you search for the last name "smith," the search will return information on both Cheryl Smith and Cheryl Werks because they are associated with the same person record.

You can search for each participant (for example, caller, prospective consumer, or other contact), by clicking on the search link. In the Caller and Prospective Consumer sections, the Search link is located in the section header. In the Contact section, the Search link is located in the detail page that opens when you add a new record.

> **Note:** Any information you type in the demographic fields can be used as part of the search. For example, if you type the last name before you select the Search link, the filter will include the last name as a search criterion.

### To use people search without filters

1. Click the **Search** link. The People Search page opens.

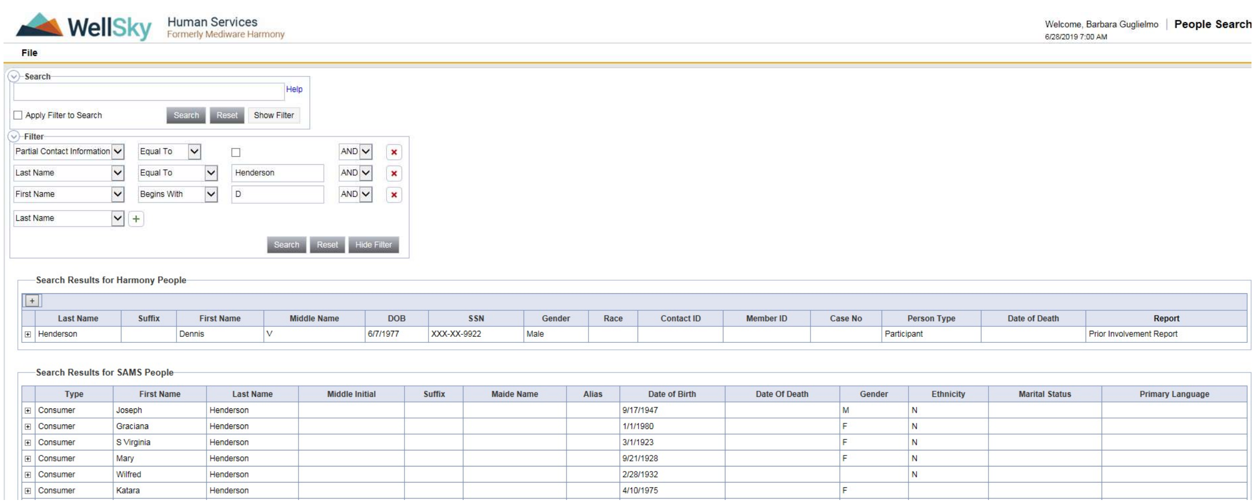



People Search window

2. Type the search value in the Search bar and click **Search**. You can search based on any of the information listed below. For example, you can search by last name or phone number to find a record.
   - First Name
   - Middle name
   - Last Name
   - Street
   - Street2
   - City
   - State
   - Zip Code

- County
- Phone
- Phone Extension
- Gender
- Race
- Ethnicity
- Identifier Value (SSN)
- Email Address

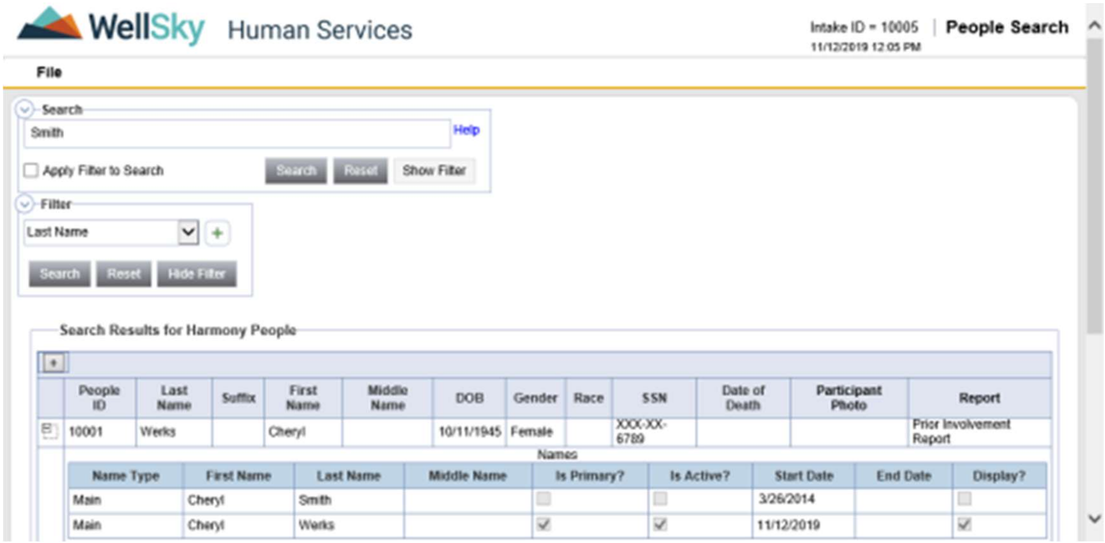
3. The search results display in two list view grid. The first grid identifies people that are in the WellSky database. The second grid identifies people that are in the SAMS database.




People Search Page

**Note:**
*If a person is selected from the SAMS grid, it will create a people record in WellSky. The next time a search is conducted on that person, their people record will display in the Harmony (WellSky) grid.*

4. Use the expansion icon (+) in the list view grid to view additional information.

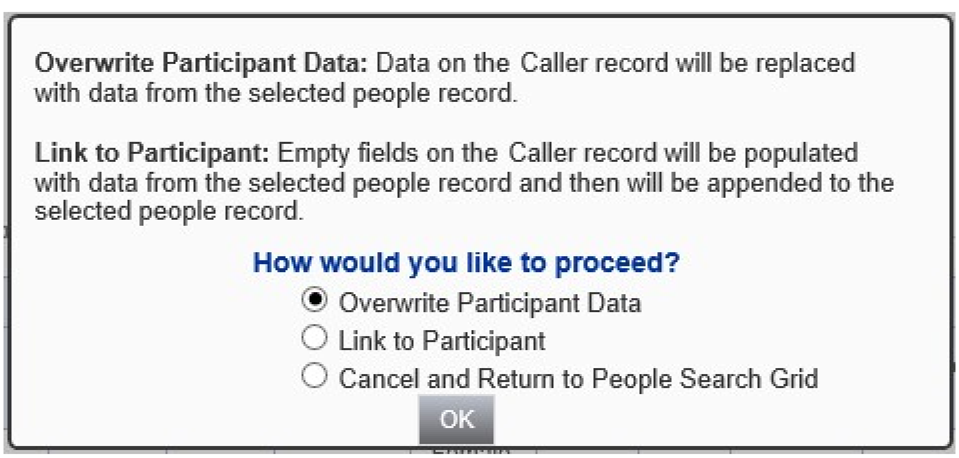



People Search Page

**Note**: Use the expansion grid to see all matching names. The search results initially show the person's name that is marked as Primary, as visible in the expansion grid.

In the example shown above, the search results show a person named "Cheryl Werks." The expansion grid shows another associated name, "Cheryl Smith." This people record includes both names, but the primary name is the one first displayed.

5. To further filter the search results, select the Apply Filter to Search option in the Search section and build your filters in the Filter section.
6. If the results return a matching record, click to select it in the list view. A popup message will appear.




The feature allows you to determine how you will use the matching record.

- **Overwrite Participant Data** — The people record will be copied into the participant record and will overwrite any data already captured in the record. The Name, Address, and Email that are flagged as Active and Display along with the DOB, Gender, Race, SSN, and Ethnicity, will populate the participant record. The phone number with the phone type of Home1, Work, Cell phone that are flagged as primary and active will also populate the participant record. This is the default setting.

- **Link to Participant** -- Use this option when the caller has participant information that is not already listed in the people record. The people record will be linked to the participant record. Data already entered into the participant record will not be overwritten with the data from the people record, but the People ID will be linked to the participant record and the data will be appended to the people record.

The record may contain more information than you see in the search results, but all available participant information will be available in the saved Call record.

# Overview of PCOC Process

The screening process can be completed in two ways: the self-selection method via the web online assessment form or within the WellSky Human Services solution.

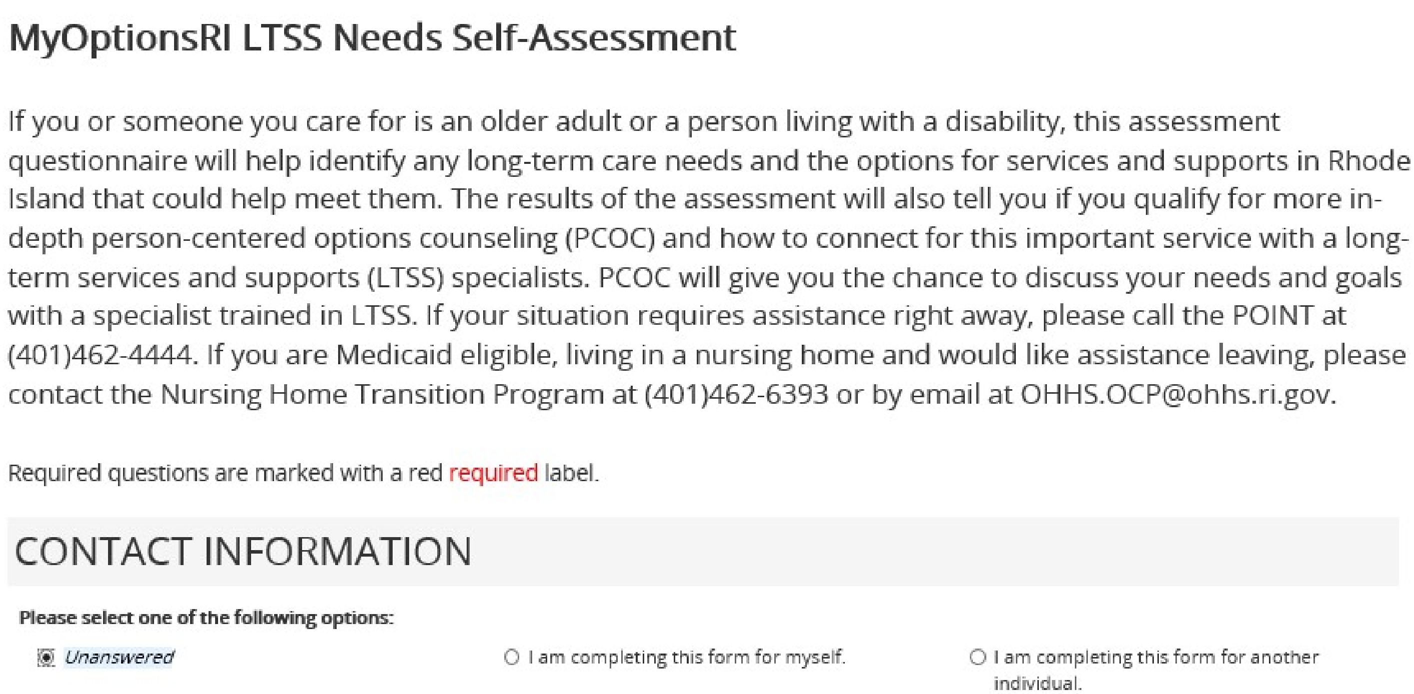
## Online Self-Assessment

**Role**: Prospective Consumer and/or Caller on behalf of the Prospective Consumer

From the PCOC website, the prospective consumer and/or caller will click on the link to the self-assessment.

### Contact Information

1. Indicate if filling out the form for self OR for another individual.



MyOptionsRI LTSS Needs Self-Assessment

If you or someone you care for is an older adult or a person living with a disability, this assessment questionnaire will help identify any long-term care needs and the options for services and supports in Rhode Island that could help meet them. The results of the assessment will also tell you if you qualify for more in-depth person-centered options counseling (PCOC) and how to connect for this important service with a long-term services and supports (LTSS) specialists. PCOC will give you the chance to discuss your needs and goals with a specialist trained in LTSS. If your situation requires assistance right away, please call the POINT at (401)462-4444. If you are Medicaid eligible, living in a nursing home and would like assistance leaving, please contact the Nursing Home Transition Program at (401)462-6393 or by email at OHHS.OCP@ohhs.ri.gov.

Required questions are marked with a red required label.

CONTACT INFORMATION

**Please select one of the following options:**

- (•) *Unanswered*
- ( ) I am completing this form for myself.
- ( ) I am completing this form for another individual.

Online Self-Assessment Page

### *Self*

2. When **I am completing this form for myself** is checked, questions will display.

## CONTACT INFORMATION

**Please select one of the following options:**

- ○ *Unanswered*
- ◉ **I am completing this form for myself.**
- ○ I am completing this form for another individual.

### Information for the Person

**First Name** required

*Enter response...*

**Middle Initial**

*Enter response...*

**Last Name** required

*Enter response...*

**Date of Birth**

*Enter response...*

**Race**

- ◉ *Unanswered*
- ○ Asian
- ○ Black or African American
- ○ American Indian/Alaska Native
- ○ Native Hawaiian/Pacific Islander
- ○ White
- ○ Some Other Race

**What is your preferred language?**

**Would you like to have a person who speaks your preferred language help you at no cost when you are contacted by the office?**

- ◉ *Unanswered*
- ○ Yes
- ○ No

**Street Address**

*Enter response...*

**Address #2**

*Enter response...*

**City**

*Enter response...*

**State**

*Enter response...*

**Zip Code**

*Enter response...*

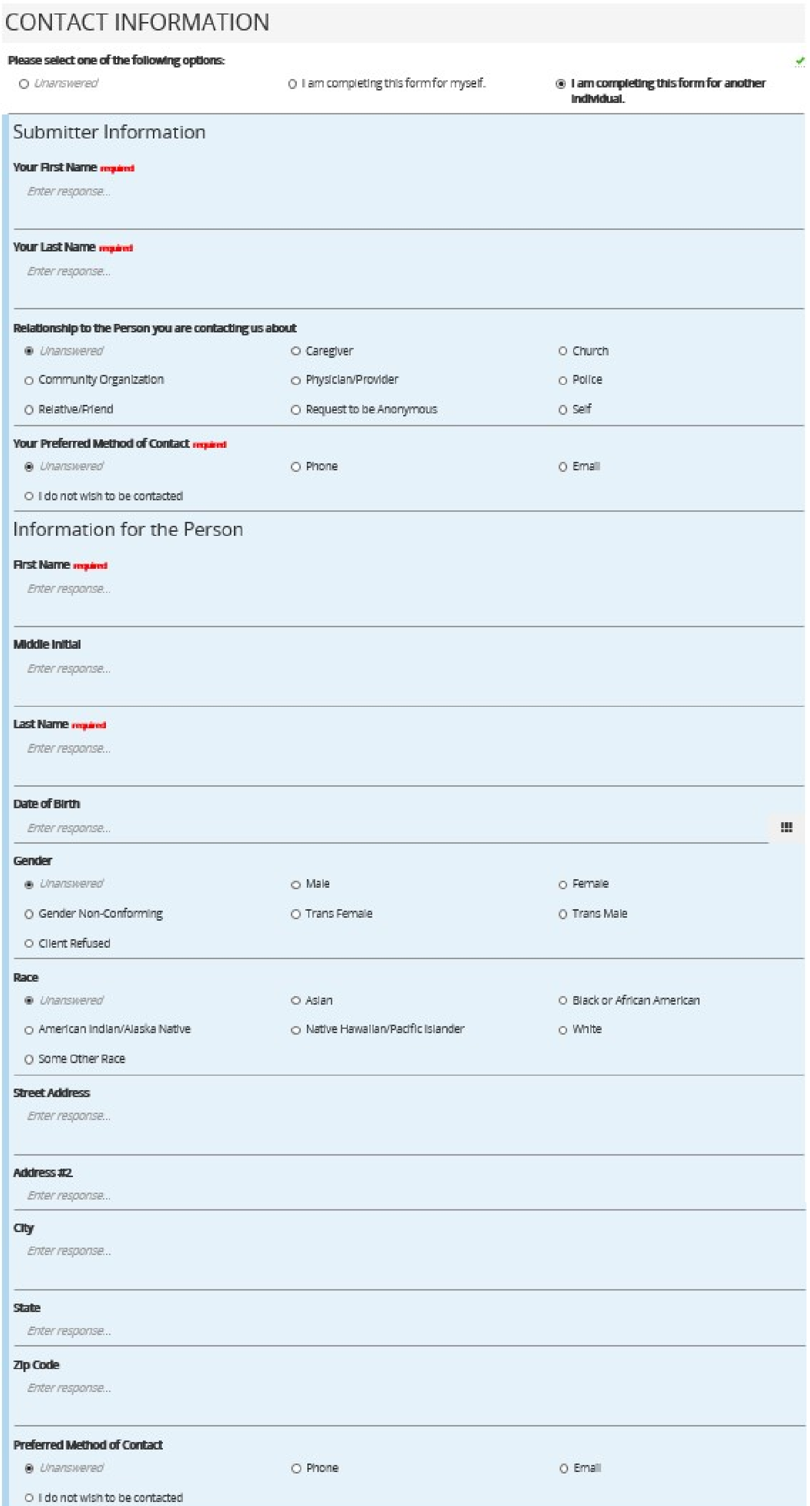
**Preferred Method of Contact**

- ◉ *Unanswered*
- ○ Phone
- ○ Email
- ○ I do not wish to be contacted

Contact Information Section: Self

### *Caller*

3. If **I am completing this form for another individual** is checked, these questions will display for the caller to complete.



CONTACT INFORMATION

**Please select one of the following options:**

- ( ) *Unanswered*
- ( ) I am completing this form for myself.
- (•) **I am completing this form for another individual.**

Submitter Information

**Your First Name** required

*Enter response...*

**Your Last Name** required

*Enter response...*

**Relationship to the Person you are contacting us about**

- (•) *Unanswered*
- ( ) Caregiver
- ( ) Church
- ( ) Community Organization
- ( ) Physician/Provider
- ( ) Police
- ( ) Relative/Friend
- ( ) Request to be Anonymous
- ( ) Self

**Your Preferred Method of Contact** required

- (•) *Unanswered*
- ( ) Phone
- ( ) Email
- ( ) I do not wish to be contacted

Information for the Person

**First Name** required

*Enter response...*

**Middle Initial**

*Enter response...*

**Last Name** required

*Enter response...*

**Date of Birth**

*Enter response...*

**Gender**

- (•) *Unanswered*
- ( ) Male
- ( ) Female
- ( ) Gender Non-Conforming
- ( ) Trans Female
- ( ) Trans Male
- ( ) Client Refused

**Race**

- (•) *Unanswered*
- ( ) Asian
- ( ) Black or African American
- ( ) American Indian/Alaska Native
- ( ) Native Hawaiian/Pacific Islander
- ( ) White
- ( ) Some Other Race

**Street Address**

*Enter response...*

**Address #2**

*Enter response...*

**City**

*Enter response...*

**State**

*Enter response...*

**Zip Code**

*Enter response...*

**Preferred Method of Contact**

- (•) *Unanswered*
- ( ) Phone
- ( ) Email
- ( ) I do not wish to be contacted

Contact Information for Caller & Prospective Consumer

## Information on Prospective Consumer

The subsequent sections of the assessment are recording information about the Prospective Consumer.

# Are you or the person you are contacting us about:

A Rhode Island resident who lives in the state more than 1/2 a year? required

- ◉ *Unanswered*
- ○ Yes
- ○ No but plan on becoming a resident
- ○ No

A youth with an intellectual/developmental disability or a serious, chronic and disabling condition who is turning age 19 or 21? required

- ◉ *Unanswered*
- ○ Yes
- ○ No
- ○ Unknown

Expected to need health care services and supports for a period that is likely to last more than a month?

- ◉ *Unanswered*
- ○ No
- ○ Yes

Have any of the following health conditions, illnesses or disabilities caused this need for services and supports: required

All / None

- ☐ A COVID infection and treatment
- ☐ Accident or injury requiring medical treatment (e.g., broken limbs, pneumonia, accident injuries)
- ☐ A chronic medical condition (e.g. heart disease, diabetes, cancer, asthma, stroke, MS)
- ☐ An intellectual/developmental disability (occurring before age 18)
- ☐ Physical condition or disability affecting mobility or functioning (e.g., para or quadraplegeic, neuromuscular disability, etc)
- ☐ Substance use disorder (e.g., alcohol, Rx abuse, illegal drugs)
- ☐ Serious and persistent behavioral health condition (e.g., depression, bi-polar, compulsive disorders, schizophrenia)
- ☐ Memory loss (alzheimer's, dementia)
- ☐ Acquired traumatic brain injury (over age 18)
- ☐ None

Receive any of the following care within the last month: All / None

- ☐ Treatment of a wound or pressure ulcer by a health professional
- ☐ At home health care
- ☐ Daily monitoring by a skilled nurse (LPN or RN)
- ☐ Physical Therapy and/or occupational therapy
- ☐ In patient psychiatric care
- ☐ Treatment with IV medication
- ☐ Hospital stay of 3 days or more
- ☐ Treatment for a substance use disorder

Experience a fall within the last month

- ◉ *Unanswered*
- ○ No
- ○ Yes

Are you or the person you are contacting us about currently living in a nursing home and would like assistance leaving the nursing home?

- ◉ *Unanswered*
- ○ Yes
- ○ No

# HEALTH COVERAGE

Health Insurance Information: Do you or the person you are contacting us about have any of the following types of health coverage? Please check all that apply. required All / None

- ☐ VA Health Coverage
- ☐ Medicare
- ☐ Private or Employer Insurance
- ☐ HealthSource RI Plan
- ☐ Rhody Health Partners or Rite Care Plan
- ☐ Medicaid All Other
- ☐ Medicaid LTSS
- ☐ Medicaid Application Pending
- ☐ Uninsured
- ☐ Unknown

# FINANCIAL INFORMATION

Do you or the person you are contacting us about receive any of the following? required All / None

- ☐ Social Security Disability Insurance (SSDI)
- ☐ Supplemental Security Income (SSI)
- ☐ Veterans Administration (VA) Benefits
- ☐ Other
- ☐ None
- ☐ Retirement, Survivors and Disability Insurance (RSDI)
- ☐ Pension or Retirement Plan

Which of the following best describes the income you/the person have on a monthly basis? required

- ◉ *Unanswered*
- ○ Less than $2,300 / month
- ○ Between $2,300 - $4,500 / month
- ○ Between $4,500 - $8,500 / month
- ○ Over $8,500 / month
- ○ Unknown

Are you or the person you are contacting us about married? If so, and tell us the combined total resources/assets of both spouses when responding to the question below.

◉ *Unanswered* ○ Yes ○ No

# LIVING ARRANGEMENT

Which of the following best describes where you/the person live(s) now? required

If you/the person reside(s) in a home-like setting (house, apartment, condo, etc.), which of the following best describes who else lives there?

- ◉ *Unanswered*
- ○ No one, live alone
- ○ Spouse/partner only
- ○ Spouse/partner and Child
- ○ Sibling(s)
- ○ Adult child/children
- ○ Minor child/children
- ○ Other relatives/friends

# ASSISTANCE WITH DAILY ACTIVITIES

## Instructional Text

In this section, we would like to know more about the areas of daily life where some type of assistance may be needed by you or the person you are contacting us about.

## Do you/the person need help on most days with any of the following: (Check all that apply)

Bathing (e.g., getting in and out of a shower/tub, using faucets, hair/body toweling)

○ Yes ○ No

Dressing (e.g., putting on/taking off clothes, socks, shoes, or stockings)

○ Yes ○ No

Toileting (e.g., getting on or off the toilet, wiping, or changing pads)

○ Yes ○ No

Eating (e.g., eat, drink, using utensils, chewing/swallowing)

○ Yes ○ No

Grooming (e.g., brushing teeth, combing hair, shaving, cutting nails)

○ Yes ○ No

Managing Medications (e.g., filling prescriptions, taking pills/medicines as directed, keeping meds organized)

○ Yes ○ No

Moving About (e.g., going from room to room or outside and back in without a walker or other assistive device)

○ Yes ○ No

Physical transitions (e.g., getting up from or moving between a bed, a chair/wheelchair, or toilet without help)

○ Yes ○ No

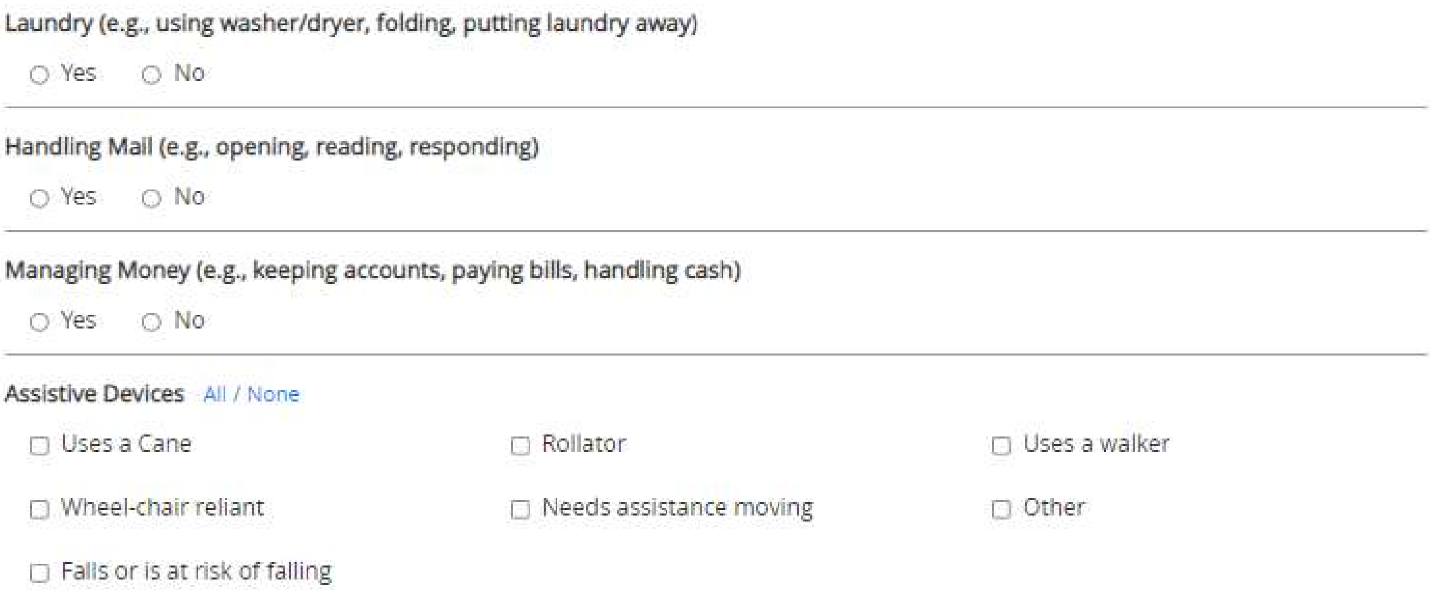
Housekeeping (e.g., general cleaning, dusting/vacuuming, washing dishes)

○ Yes ○ No

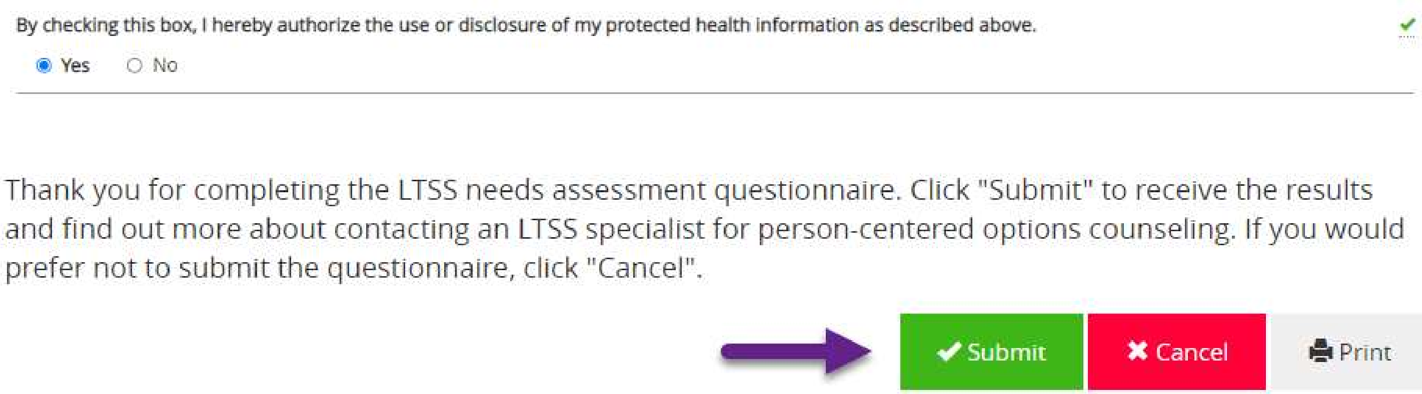
Preparing Meals (e.g., planning, cooking, serving and clean-up)

○ Yes ○ No

Shopping (e.g., grocery, clothes, prescriptions)




4. At the end of the form, click **Submit**.




Online Self-Assessment Page

5. A message will display on the screen, letting the individual know that the submission was successful. A record number is provided for their reference. The message allows you the option to return to the RI EOHHS website or print the information submitted.

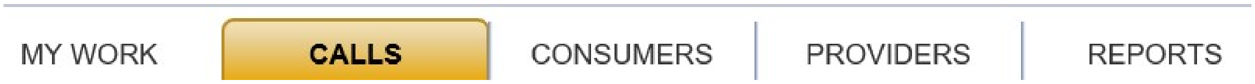

Success Message

## Online Self-Assessment Submission

PCOC Supervisors will be monitoring online submissions and assigning MyOptions Advisors to follow up with the prospective consumer and/or caller.

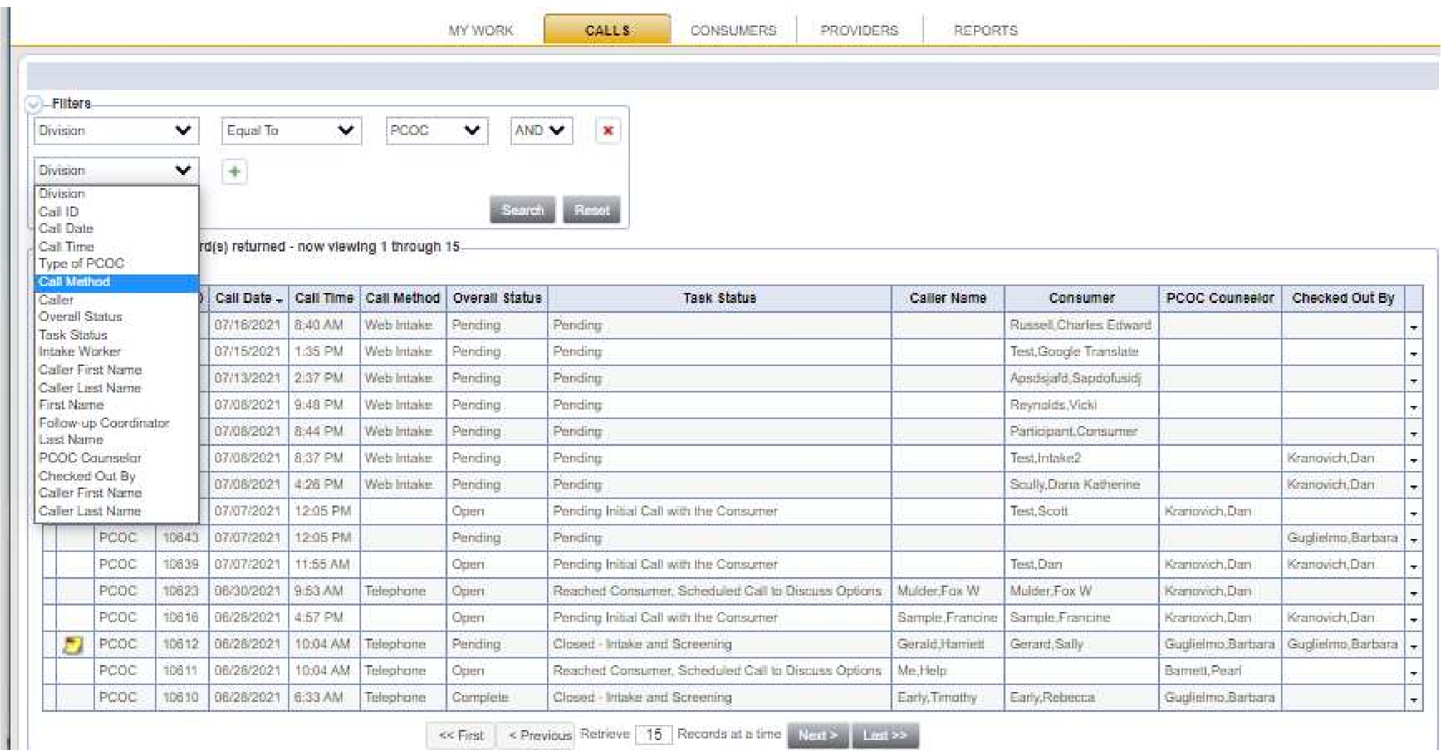
**Role**: PCOC Supervisor

1. After logging into WellSky, click on the Calls Chapter.



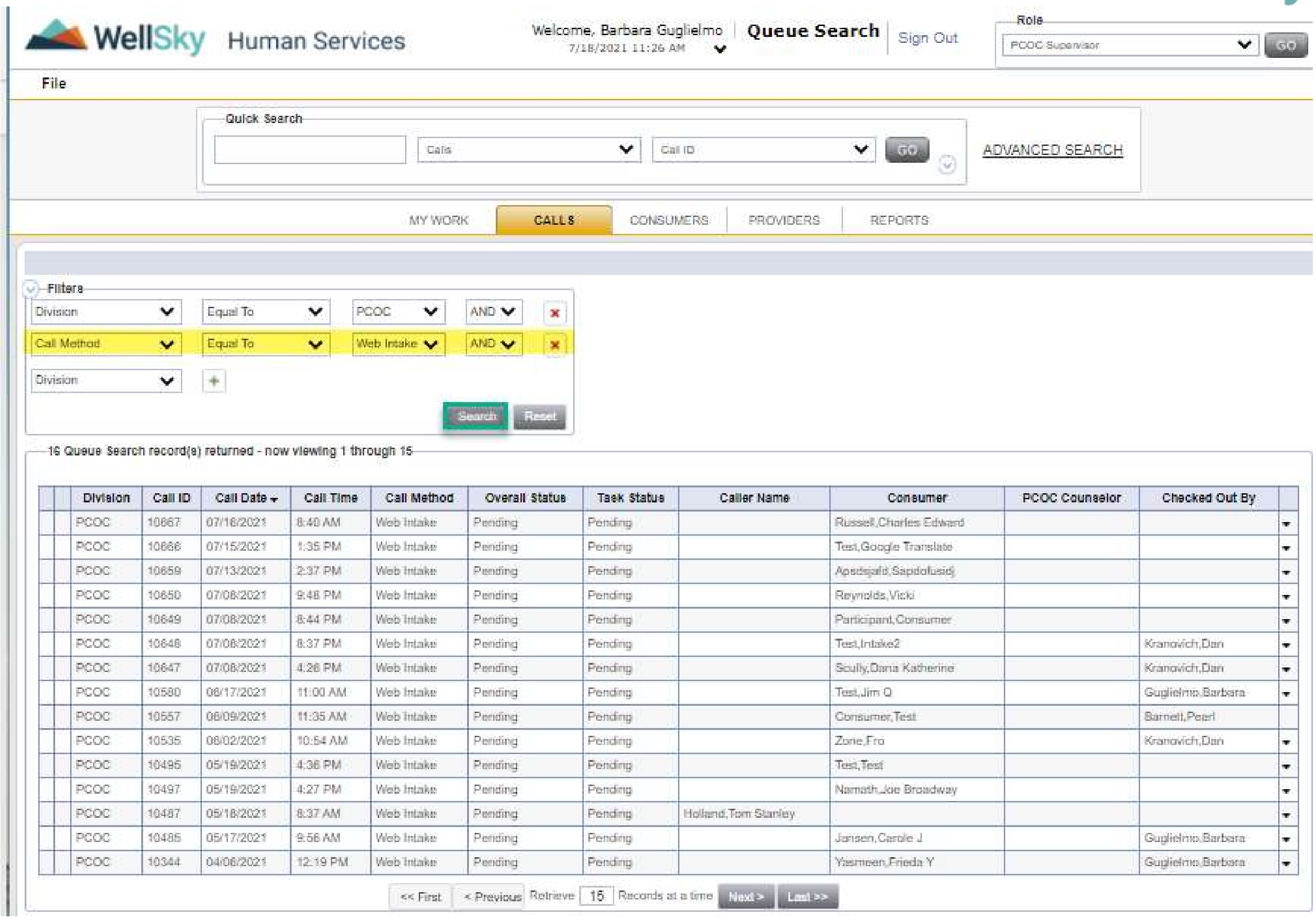

WellSky Chapters

2. Redefine the Advanced Search filter by selecting Call Method.




Calls Advanced Search Filter

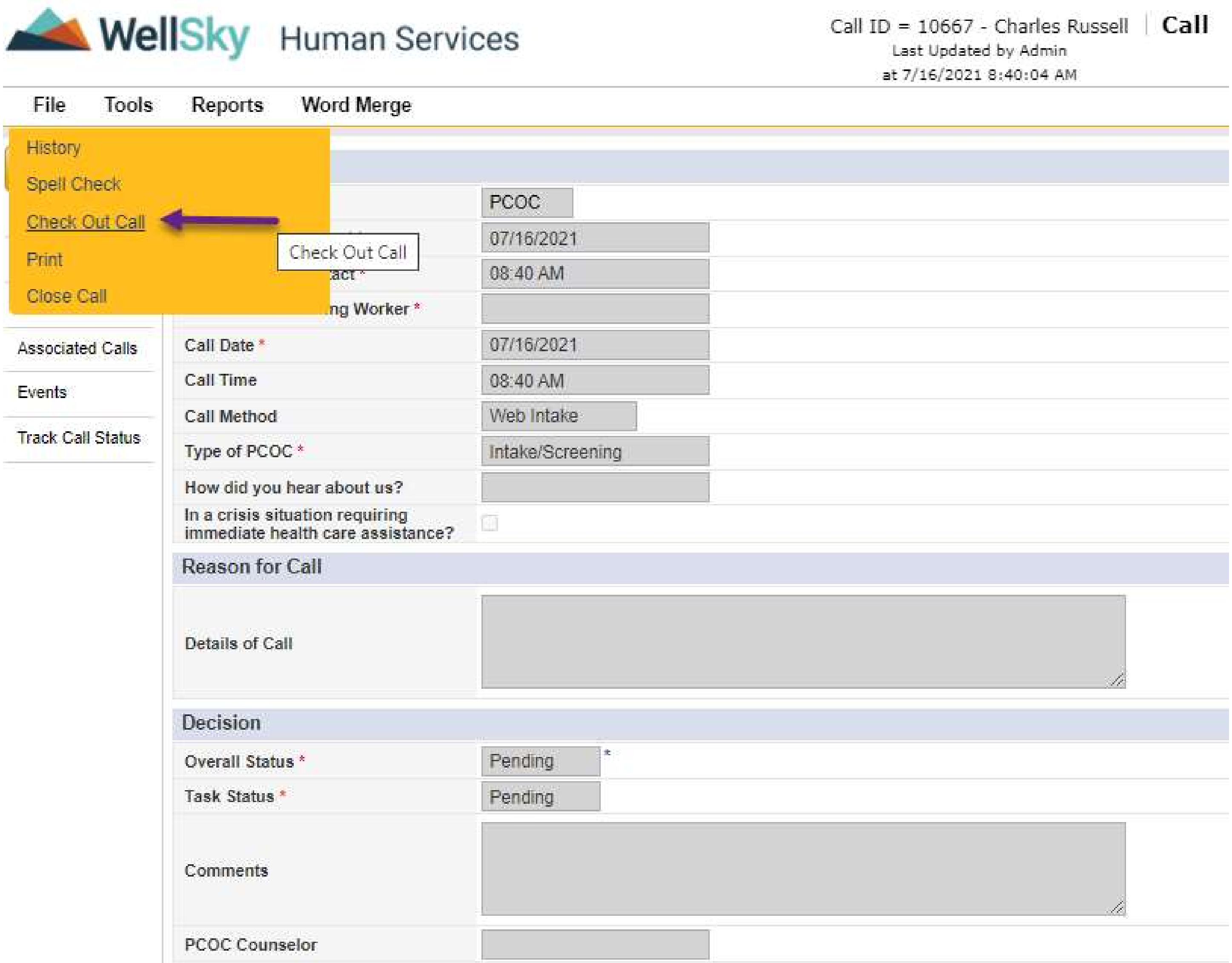
3. Click on the + plus sign.
4. Select **Web Intake** from the dropdown list and click **Search.**



Call Records Results

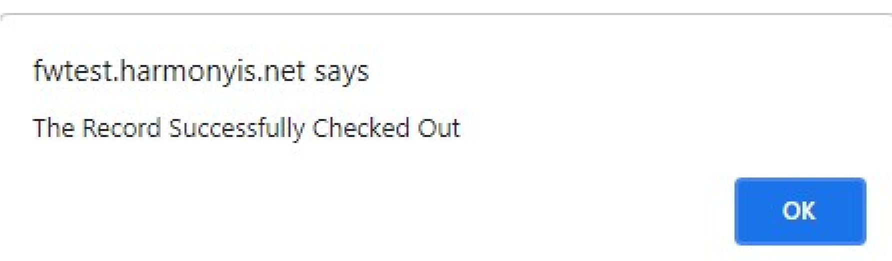
**Note**
*Another indicator that a record needs a PCOC Counselor\MyOptions Advisor assigned is the PCOC Counselor field is blank. The filter can be modified by selecting PCOC Counselor Equal to Blank.*

5. The results will display with the latest online self-assessment. Click on the record to open.
6. Select **Check Out Call** from File menu.




Call Details Page

7. Click **OK.**




Message Window

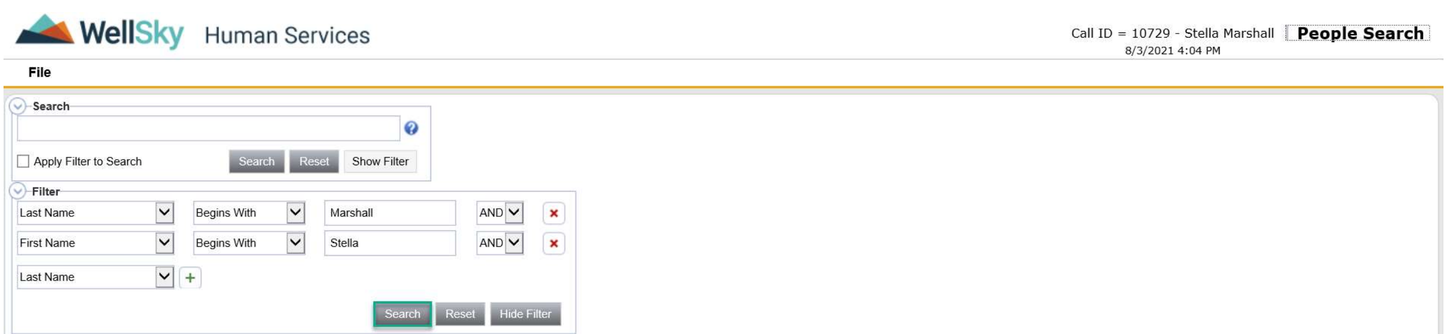
8. Click on the Participants subpage.
9. From the Participant list grid, click on a participant.


Participant List Page

10. Select Search for Person from the Tools Menu.

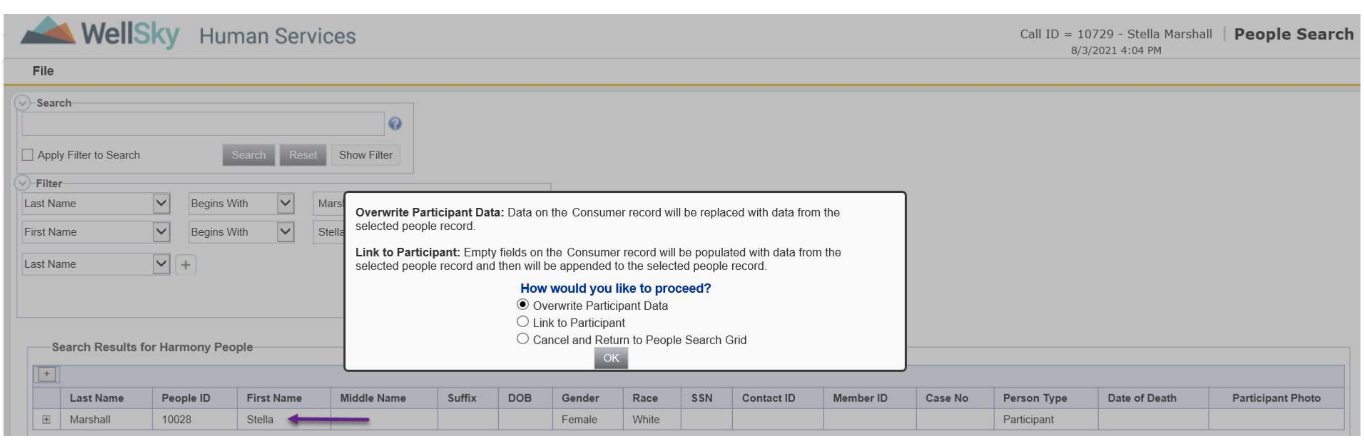

Click Search for Person from Tools Menu

11. The People Search window will display.




People Search

12. Click **Search**.
13. If no results return, Select **Close People Search** from the File menu.
14. If results return, verify that the people record in the grid is the same person. If so, click on the name in the results grid.

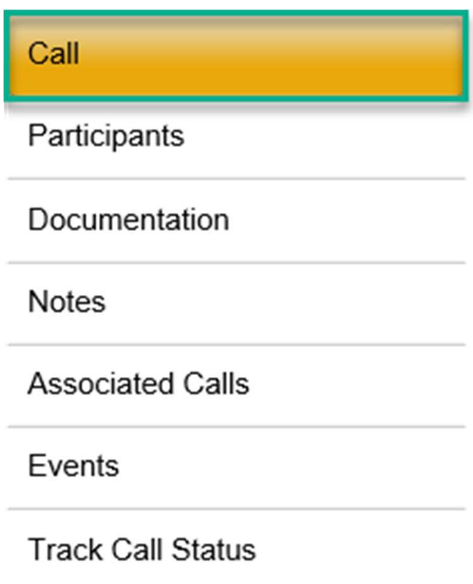



People Search

The feature allows you to determine how you will use the matching record.

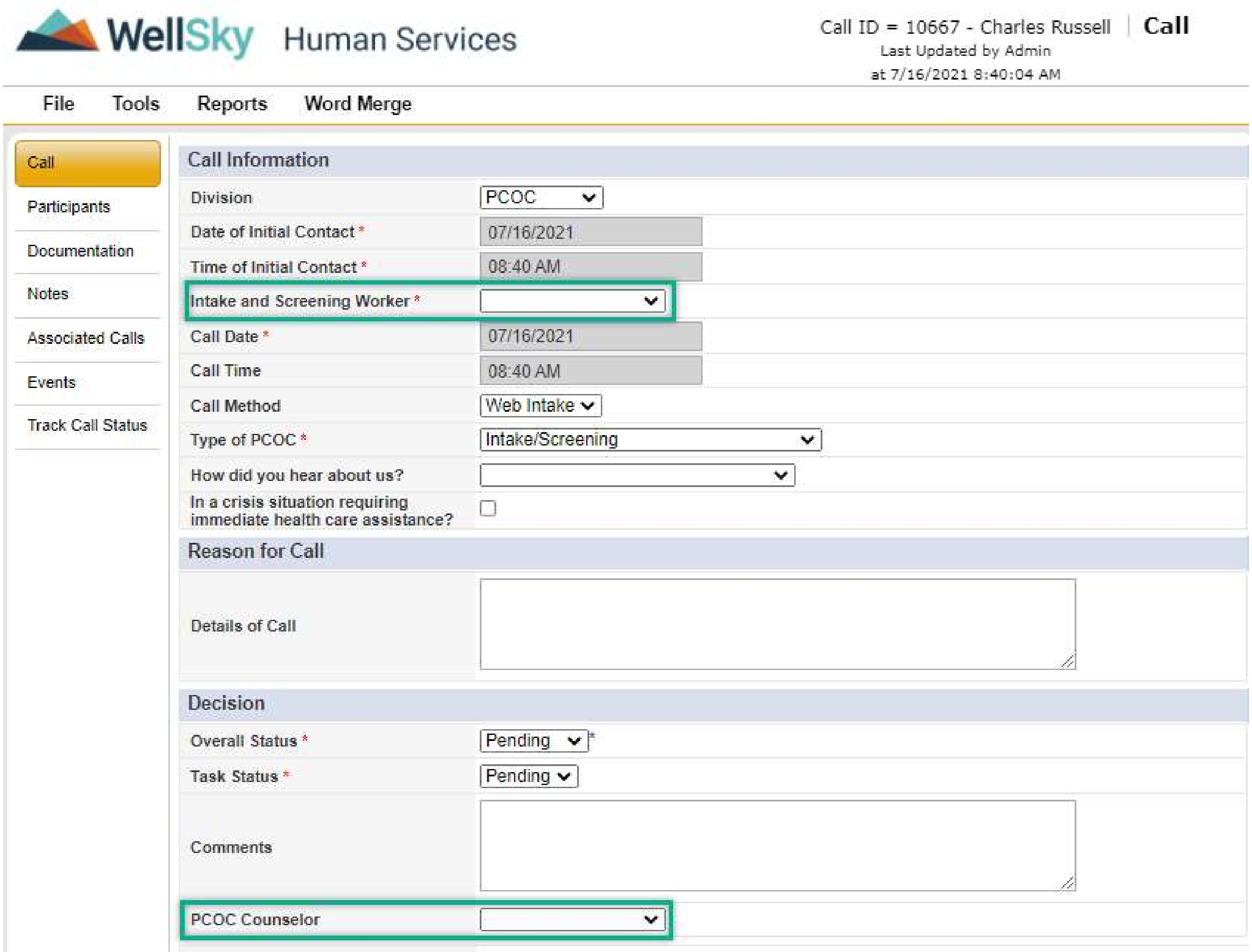
a. **Overwrite Participant Data** — The people record will be copied into the participant record and will overwrite any data already captured in the record. The Name, Address, and Email that are flagged as Active and Display along with the DOB, Gender, Race, SSN, and Ethnicity, will populate the participant record. The phone number with the phone type of Home1, Work, Cell phone that are flagged as primary and active will also populate the participant record. This is the default setting.
b. **Link to Participant** -- Use this option when the caller has participant information that is not already listed in the people record. The people record will be linked to the participant record. Data already entered into the participant record will not be overwritten with the data from the people record, but the People ID will be linked to the participant record and the data will be appended to the people record.

15. Make a selection and click **OK.**
16. From the Call Participant Details page, Select **Save and Close (Caller, Consumer or Other Contact)** from the File menu.
17. Repeat steps 9-15 for other call participants.
18. Click on the Call Subpage.



Call Subpages

19. On the Call Details page, complete the following:




Call Details Page

a. **Intake and Screening Worker:** Select **the Web Intake, Worker** from dropdown list.

b. **PCOC Counselor:** Select the worker from dropdown list.

20. Select **Save, Check In and Close Call** from File menu.

**Note**

*Assigned PCOC Counselor\MyOptions Advisor will see the Web Intake Submission on their Call Records grid when they navigate to the Calls Chapter. Refer to section,* ***Online Self-Assessment Record and PCOC Process****, page 47.*

## Practice #1 Exercise

**Practice Exercise #1**

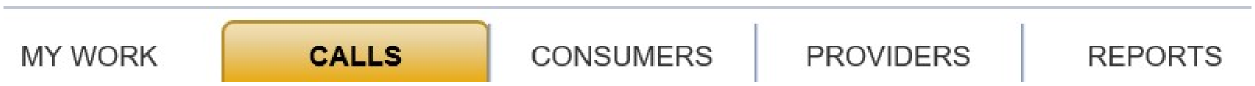
1. Complete an online self-assessment.
2. Open the Web Intake record from the Calls Chapter.
3. Assign record to a worker.

## Add Call in WellSky

PCOC Staff will enter calls received by logging into WellSky.

**Role**: PCOC Worker

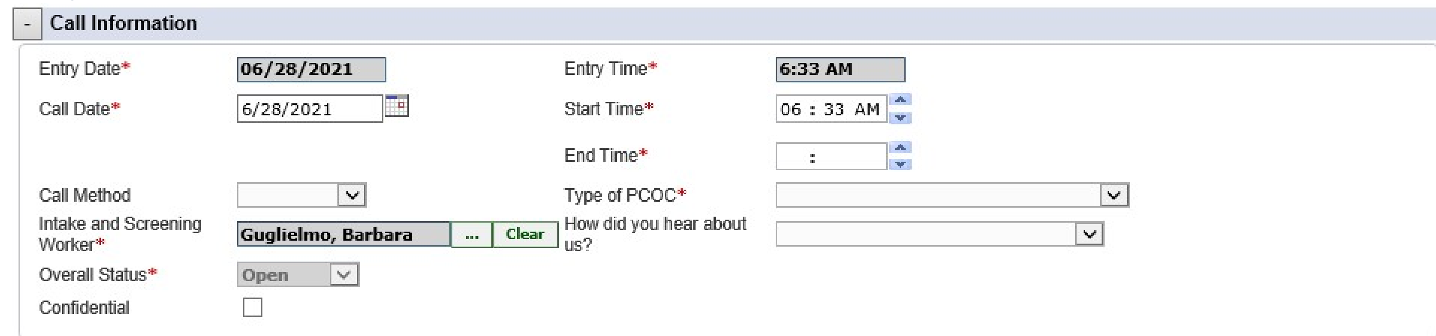
1. After logging into WellSky, click on the Calls Chapter.




Click Calls Chapter.

2. Select **Add Call** from the File menu.
3. The Add Call details page will display.

### *Call Information*




Add Call > Calls Information

1. This section captures information about the call. Fields with an asterisk * are required.
2. Select a value for the **Call Method**.
3. Select a value for **Type of PCOC**.
4. Select a value for **How did you hear about us**?

**Note**

*Fields with a red asterick *: The field is required.*

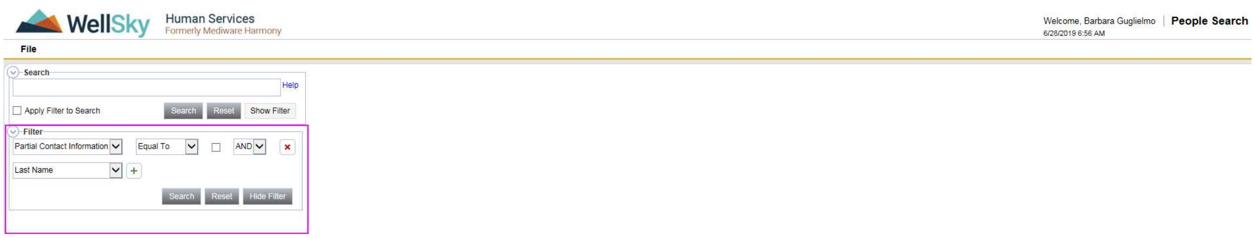
*Confidential/Restricted*: When selected, this checkbox makes the record only available to workers whose names are directly associated with the call. System administrators and the supervisors of these workers are also able to open and view the record.

### *Caller*

1. This section captures information on the caller.
2. Click **Search** to add the caller's information.


Click Search for Caller.

3. The People Search window will display.
4. Enter the name of the caller, by using the Search text box or configuring the filter by First and Last Names. Click **Search.**

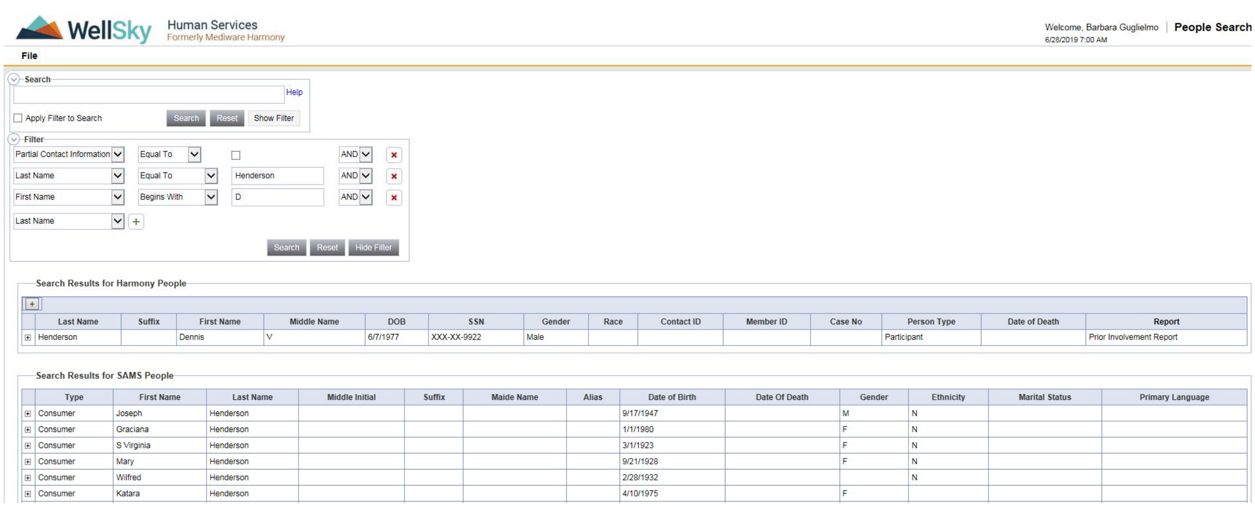


People Search Window

5. Select a field from the dropdown down and click on the + and enter the value in the text box.
6. Once filter is established, click **Search**.

## If Results Yield a Match

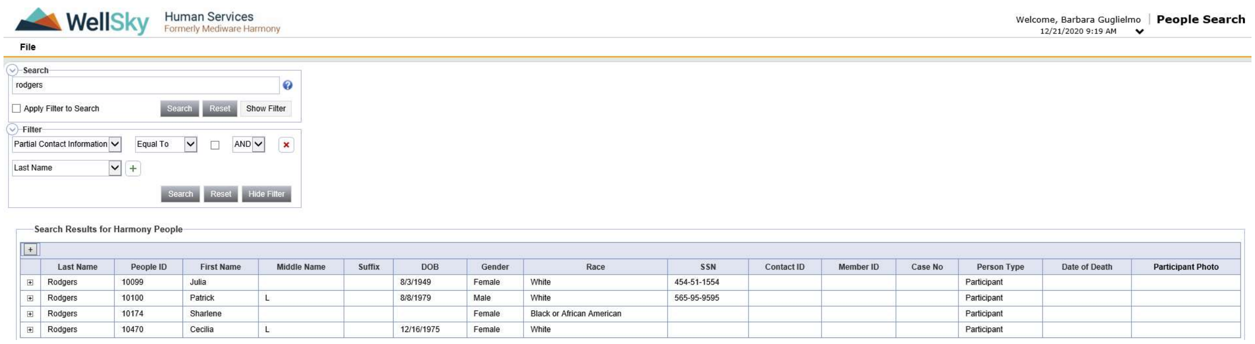
7. The search results display in two list view grid. The first grid identifies people that are in the WellSky database. The second grid identifies people that are in the SAMS database.



People Search Page

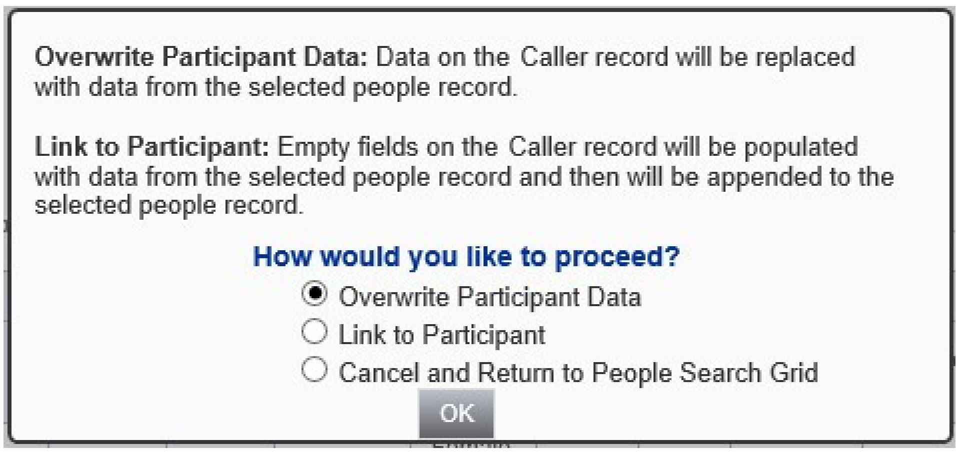
**Note:**
*If a person is selected from the SAMS grid, it will create a people record in WellSky. The next time a search is conducted on that person, their people record will display in the Harmony (WellSky) grid.*

8. Click name in search results grid.



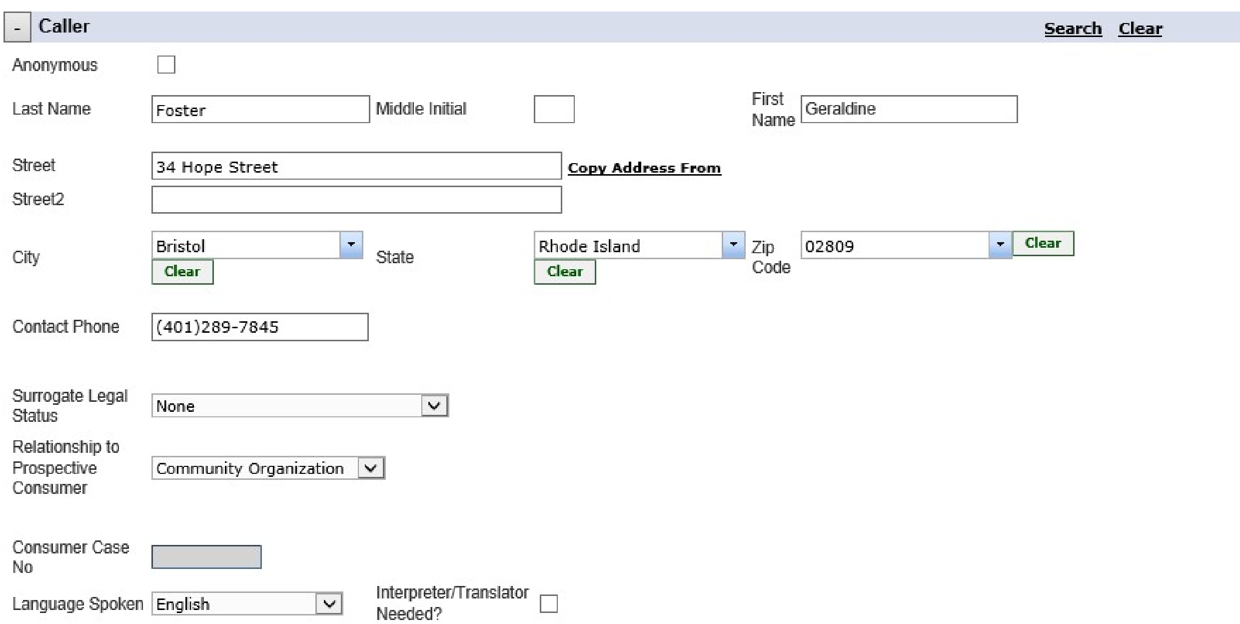

Click name in search results grid.

7. A message will display.



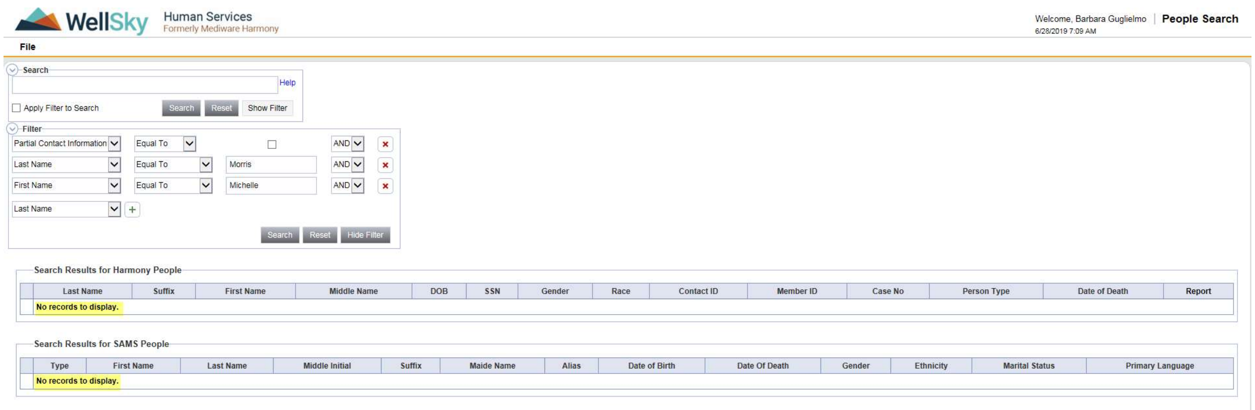

People Search message displays.

8. Click **OK**. The People Search window will close and return the user to the Add Call page.
9. The information from the individual's People record will display in the Caller's section.



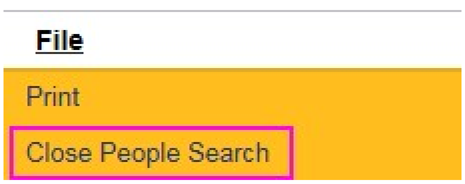

Add Caller>Caller Section

## If Results Do Not Yield a Match



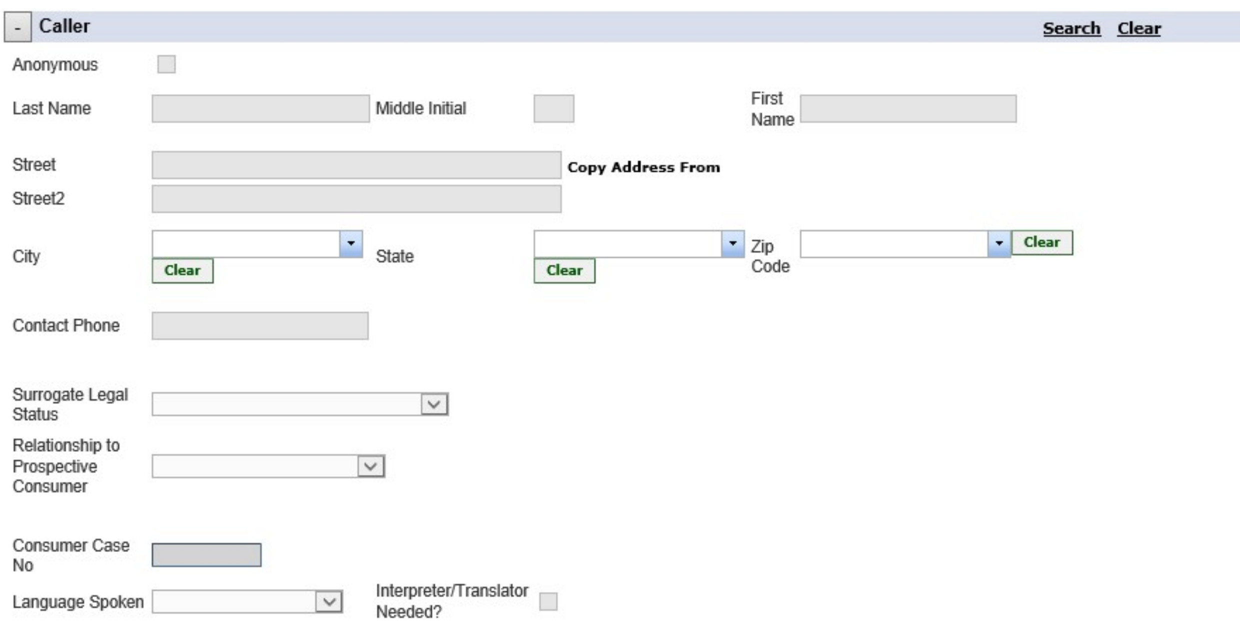

People Search

10. If your search does not result in any matches, select Close People Search from File menu.




File>Close People Search

11. The People Search window will close and return the user to the Add Call Details page.
12. Complete the necessary information in the section.

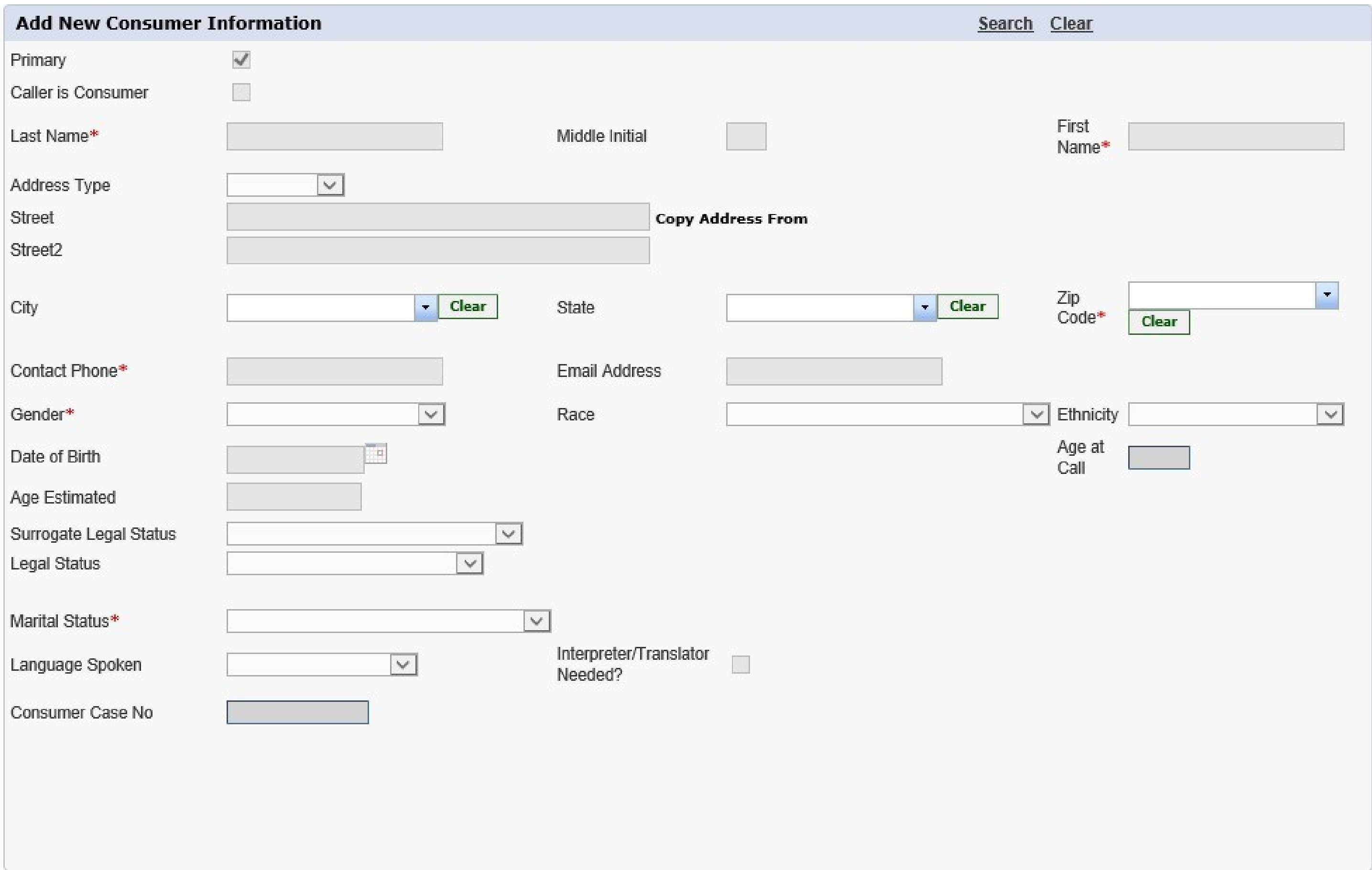



Add Caller>Caller Section

### *Prospective Consumer*

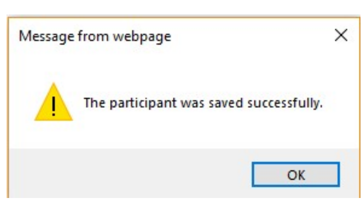
13. To add a prospective consumer, click **Add.**


To add a prospective consumer, click Add.




Add Call>Prospective Consumer

14. If the prospective consumer is also the caller, check **Caller is Prospective Consumer.**
15. If not, follow steps 8-17.
16. When complete, select **Save and Close Consumer** from the File menu.
17. A message will display. Click **OK**.




Participant saved successfully.

**Note**

*If the consumer is new to the system, you can use the Copy Address From. When selected, a new window will appear with the address of other persons related to the call (Caller, Other Contact). Select an address from the grid. The window will close and the address will appear for the prospective consumer.*

### *Reason for Call*

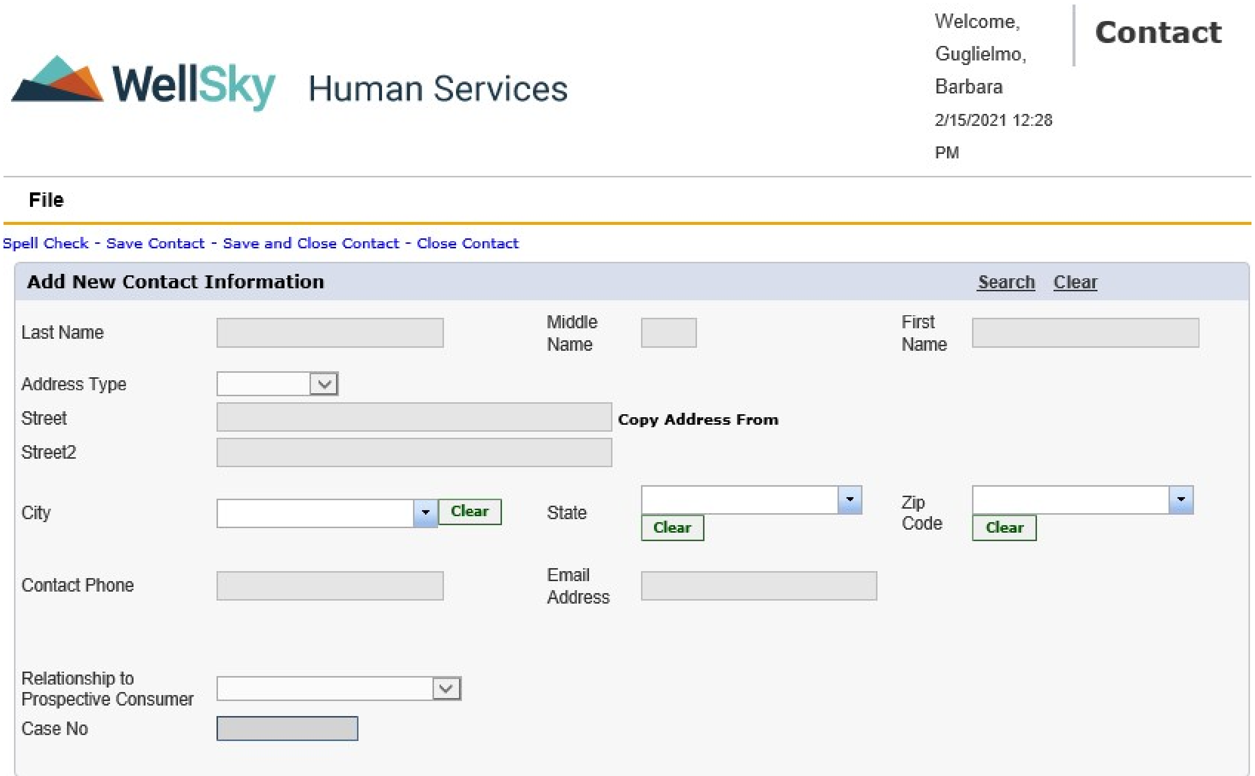
1. Enter reason for call in the Details of Call textbox.
2. If the individual is experiencing a crisis, check the box for **In a crisis situation requiring immediate health care assistance**?


### *Contacts*

1. To record additional persons, click **Add.**

To record additional persons, click Add.

2. Enter the necessary information.

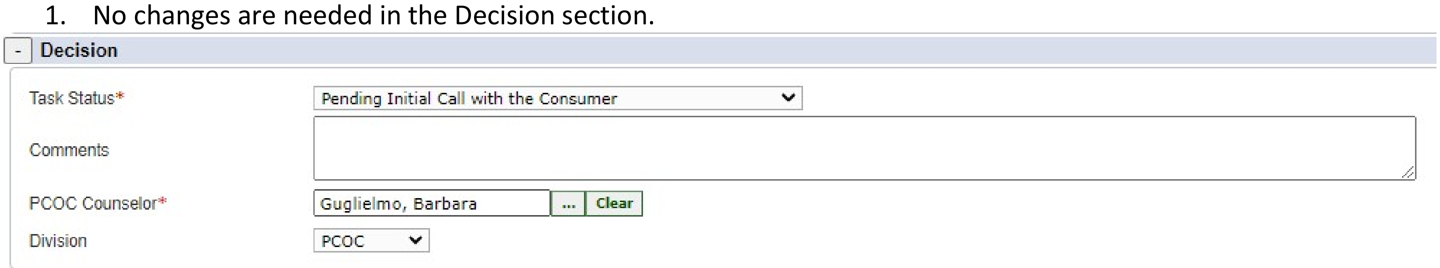



Add Call>New Contact

3. When complete, select **Save and Close Contact** from the File menu.

### *Decision*

1. No changes are needed in the Decision section.




Add Call>Decision

*To continue working with the call record:*

2. When complete, Select **Save, Close and Edit Call** from the File menu.

*To submit the call record and work on it in the future:*

3. When complete, Select **Save, Check In and Close Call** from the File menu.

CAUTION

**Note**

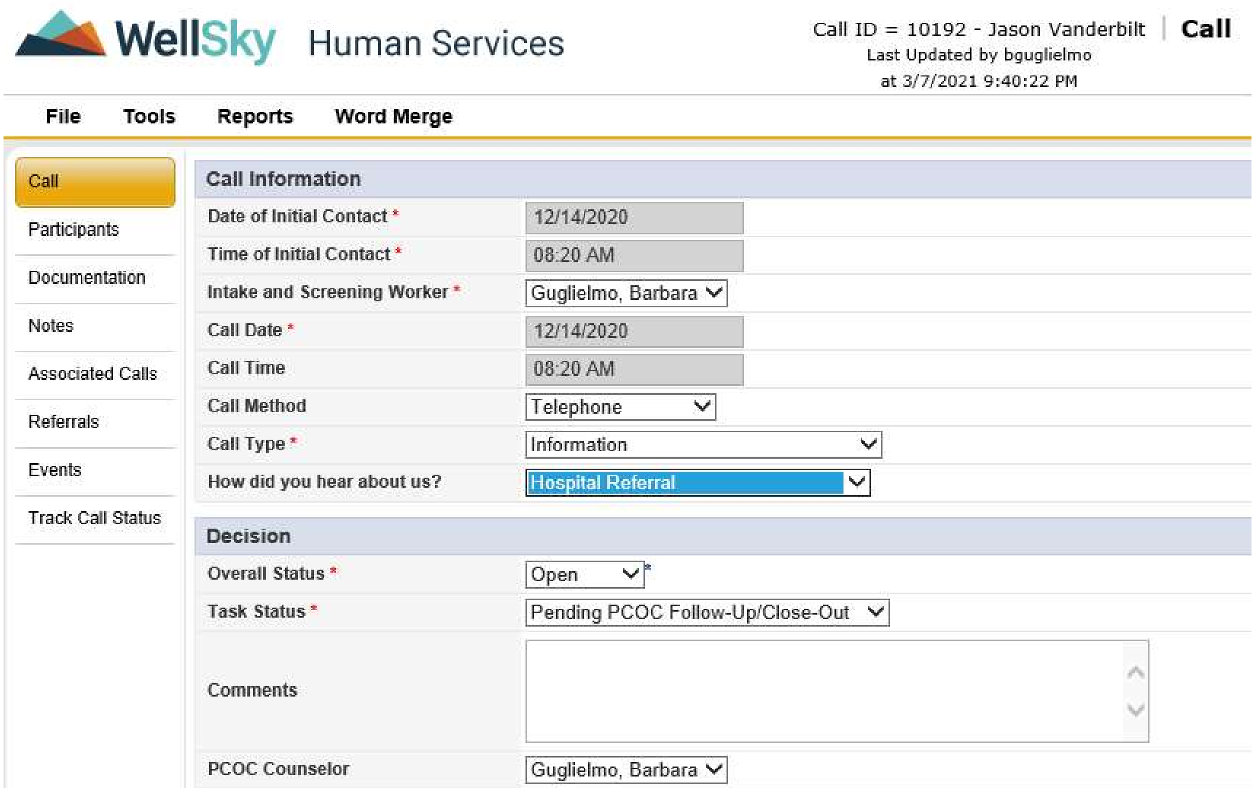
*Do not use the browser window close button (X) to close records. Unsaved changes will be lost and cannot be retrieved.*

### File menu options from the Add Call page

- **Save** – This option saves any changes to the Call form since the last save. This can be completed at any time while working with the Call form and will not close the Call form.
- **Save and Close** – This option saves any changes to the Call form since the last save and closes it. The Call record is still checked out to the Worker, so no other workers can modify the record until it is checked back in.
- **Save, Close, and Check-In –** This option saves any changes to the Call form since the last save, closes it, and checks in the record. If another worker needs to edit the record, they can check it out.
- **Save, Close, and Edit –** This option saves any changes to the Call form since the last save, closes the form, and opens the record in edit mode.

*If continuing to work with the call record:*

4. The Call Details page will display.



Call Details page

*For multiple prospective consumers (caller is reporting on their parents), go to page 52.*

## Practice #2 Exercise

**Practice Exercise #2**

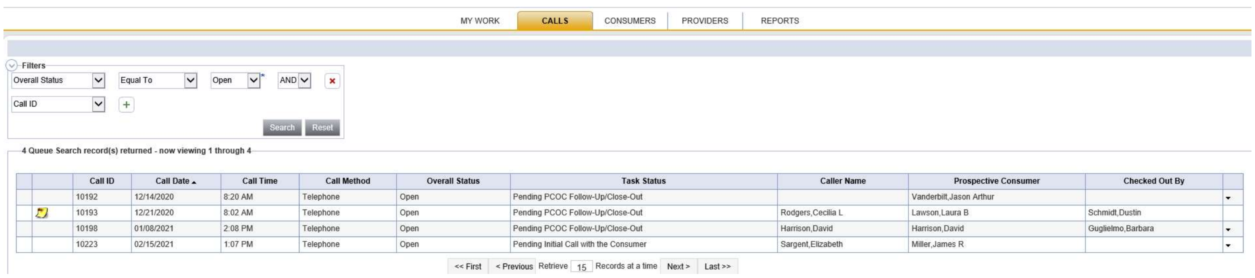
1. Add a Call record.
2. Complete a People Search for Call Participants.
3. Save Call record.

## Online Self-Assessment Record and PCOC Process

Online Self-Assessment records are available in the Calls Chapter. To access the record:

1. Click on the Calls Chapter.

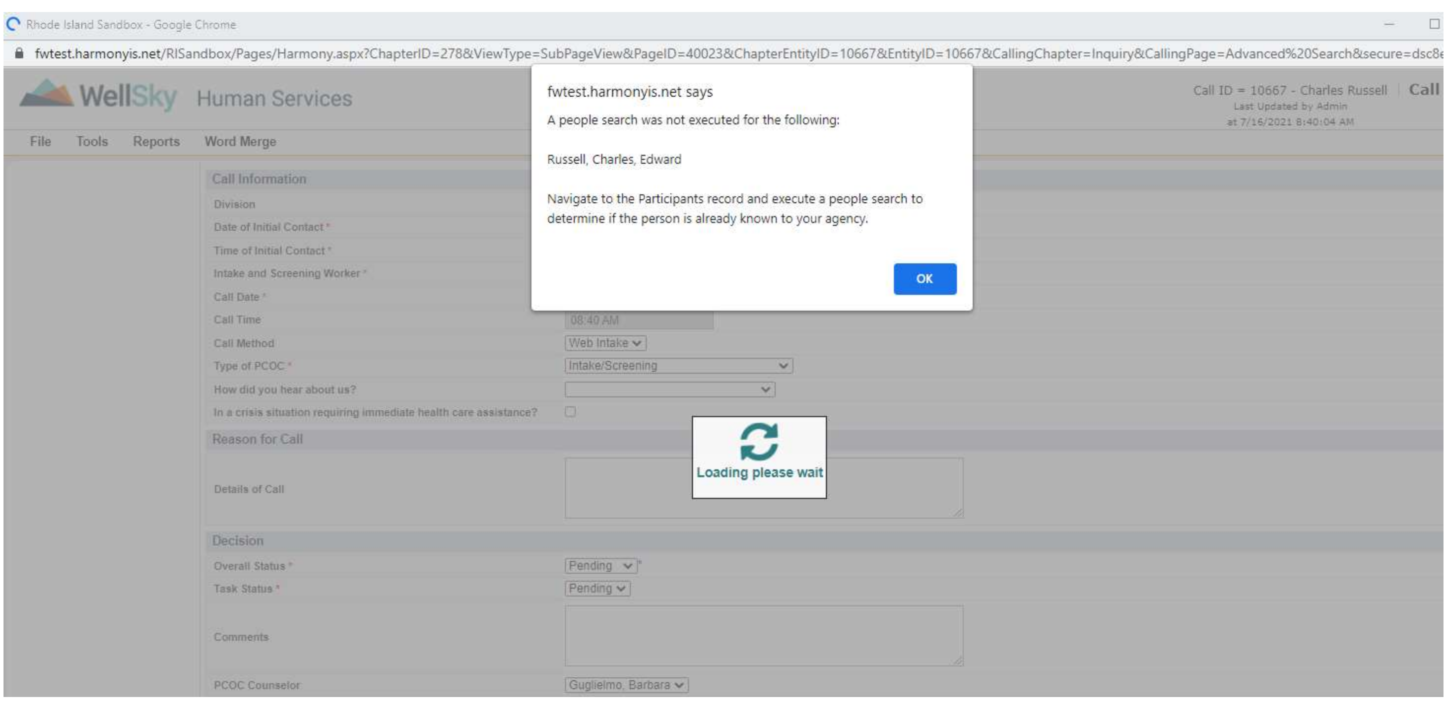

2. Select a record with a Call Method = **Web Intake** from the Call List Grid.




Call List Grid page

*The last column of the grid, **Checked Out By**, lets you know if another worker has the record checked out. If that is the case, you will be able to open the record to view only.*

3. The Call Details page will display.
4. Select Check Out Call from File menu.
5. A People Search will need to be completed on the participants. Click OK.




Message to do a People Search

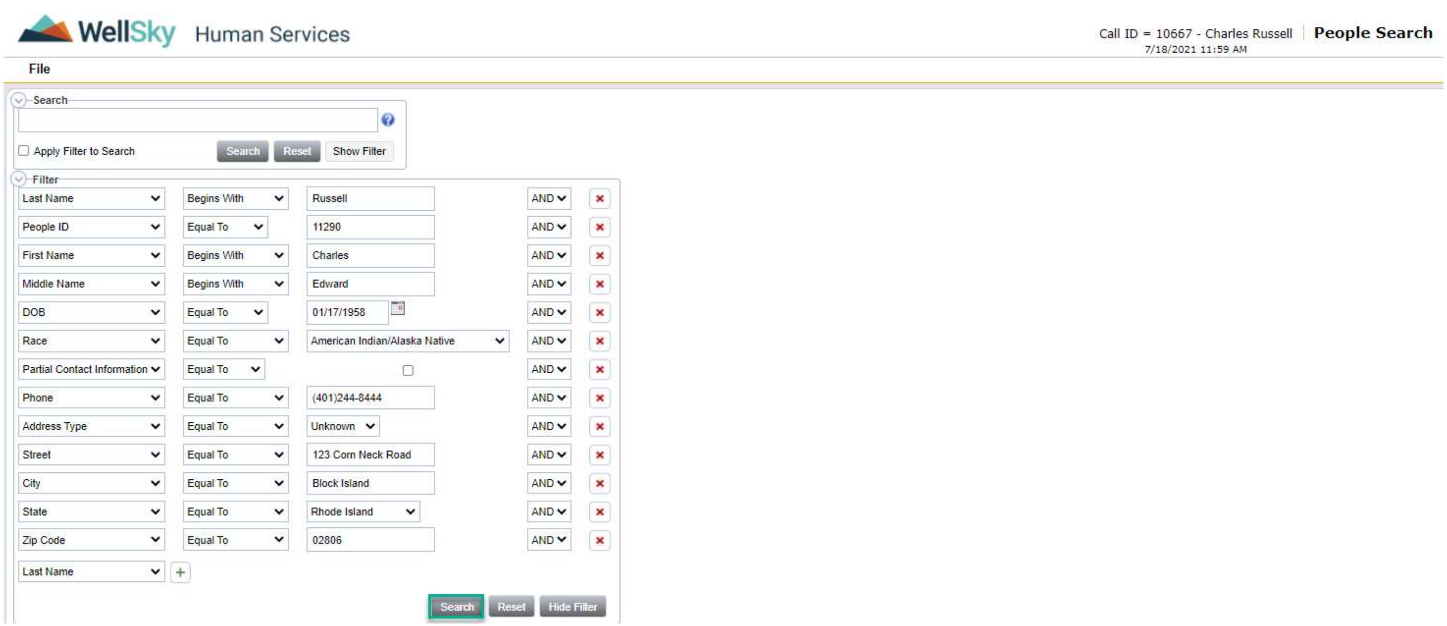
6. Click on the Participants subpage.
7. From the Participants list page, click on a participant record.

Participants List Page

8. From the Participants Details page, Select **Search for Person** from the Tools menu.

Select Search for Person from Tools Menu

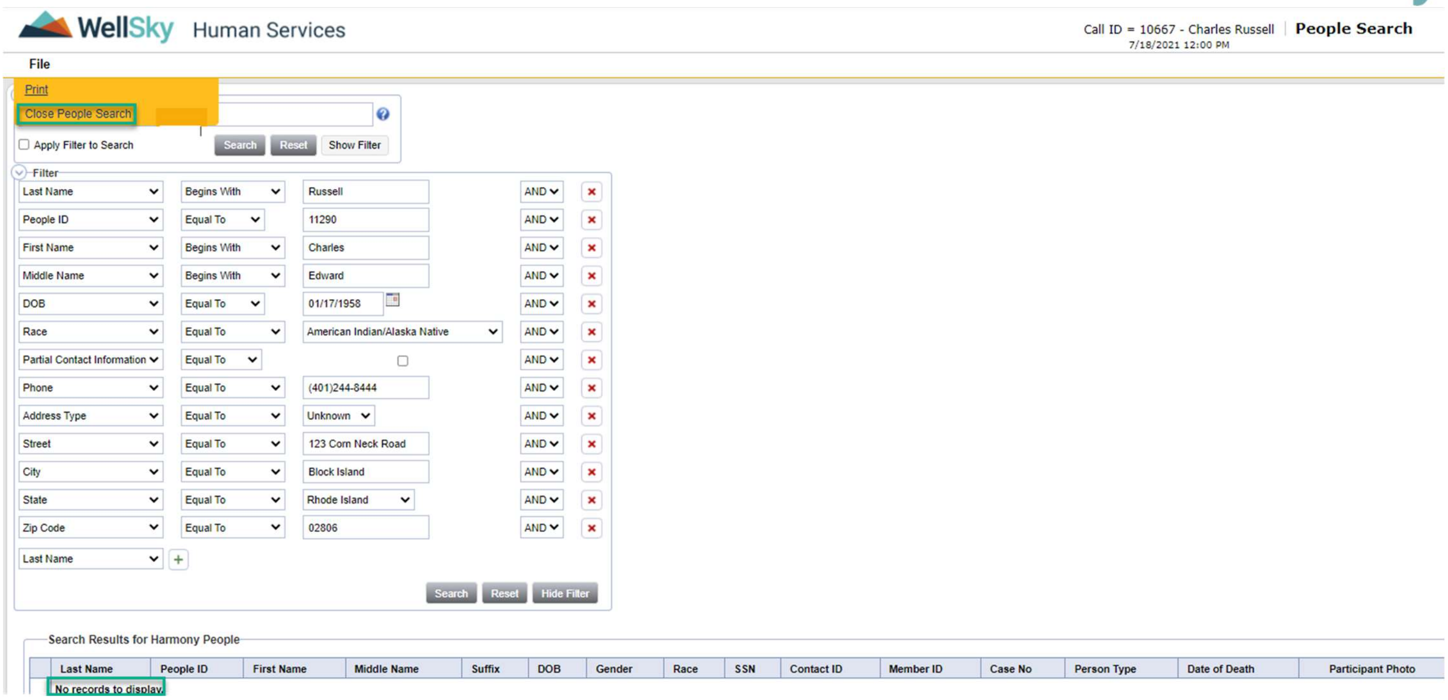
9. The People Search window will display. The search results display in two list view grid. The first grid identifies people that are in the WellSky database. The second grid identifies people that are in the SAMS database. Click Search.



People Search Page

## If Results Yield No Match

9. If no records return, Click **Close People Search** from File menu.

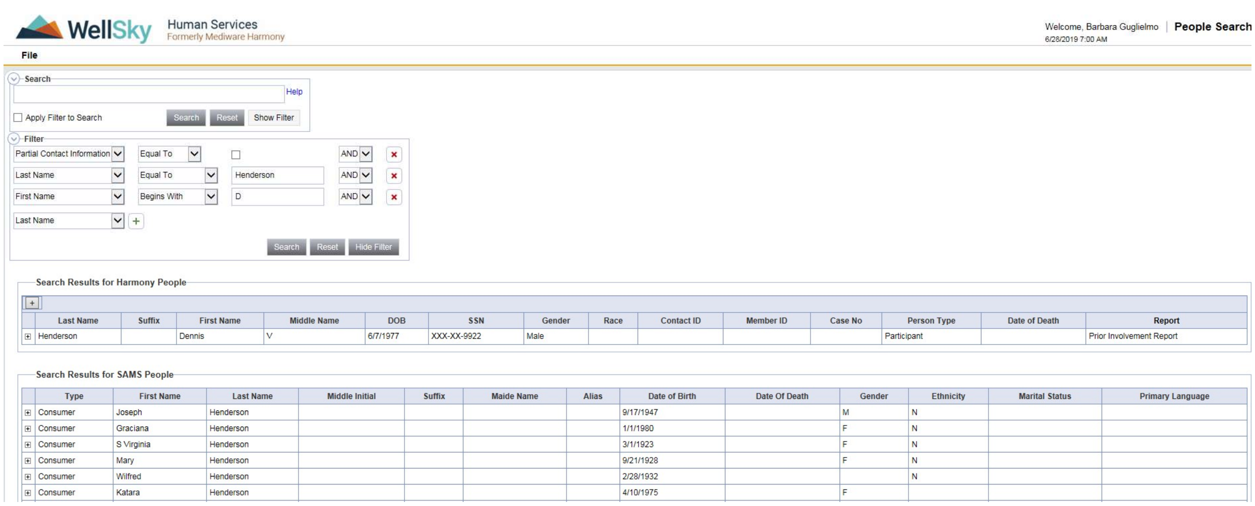



People Search Page

10. Select **Save and Close Consumer (or Caller)** from File menu.

## If Results Yield a Match

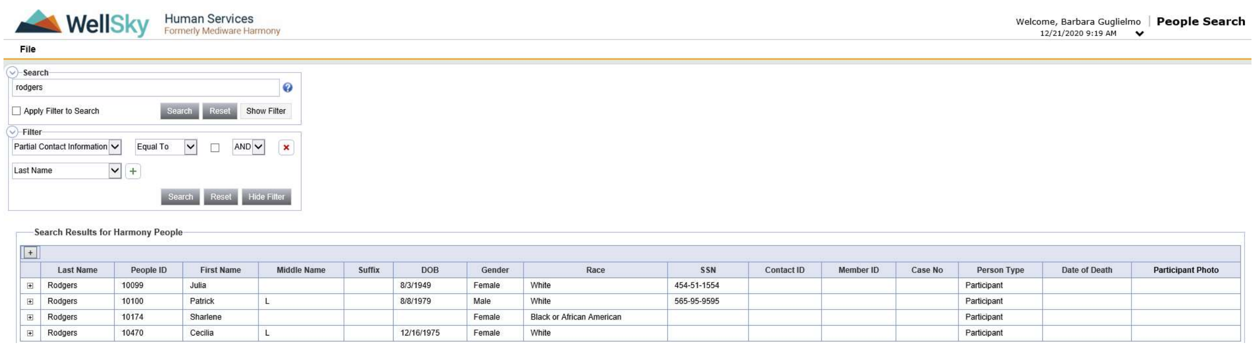
10. The search results display in two list view grid.  The first grid identifies people that are in the WellSky database. The second grid identifies people that are in the SAMS database.




People Search Page

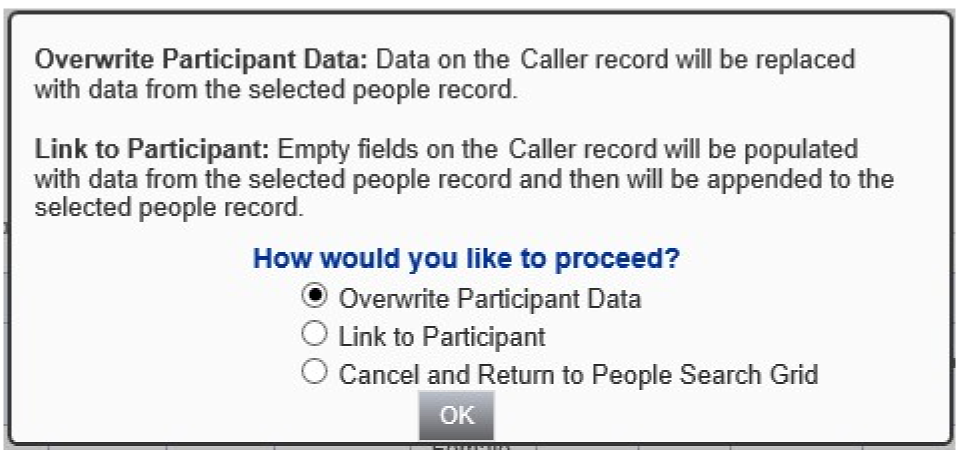
> **Note:**
> *If a person is selected from the SAMS grid, it will create a people record in WellSky. The next time a search is conducted on that person, their people record will display in the Harmony (WellSky) grid.*

11. Click name in search results grid.



Click name in search results grid.

18. A message will display.

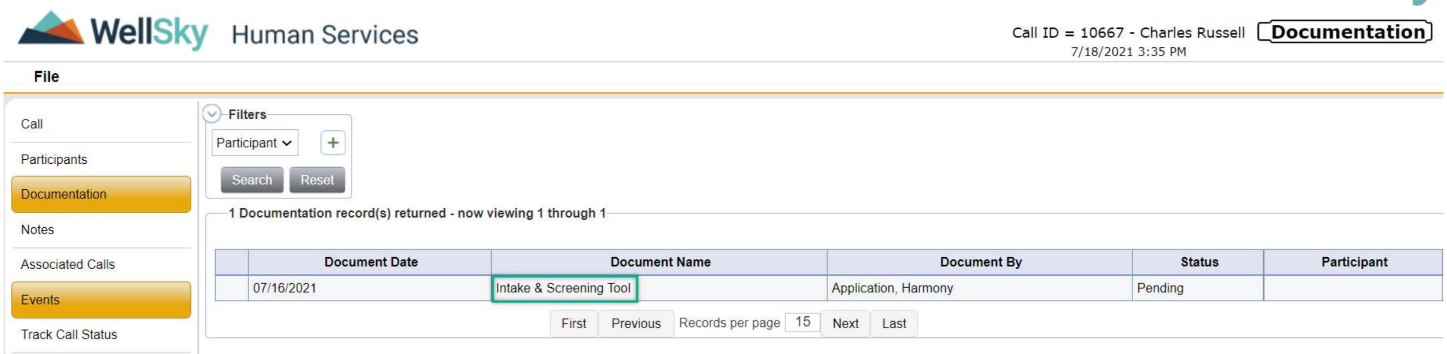


People Search message displays.

19. If only partial information was provided from the web form and the existing record is more comprehensive, select Overwrite Participant Data.
20. If the information provided from the web form is different than the information in the existing record, select **Link to Participant.**
21. The People Search window will close and return you to the Participant Details page.
22. Select **Save and Close Consumer (or Caller)** from File menu.

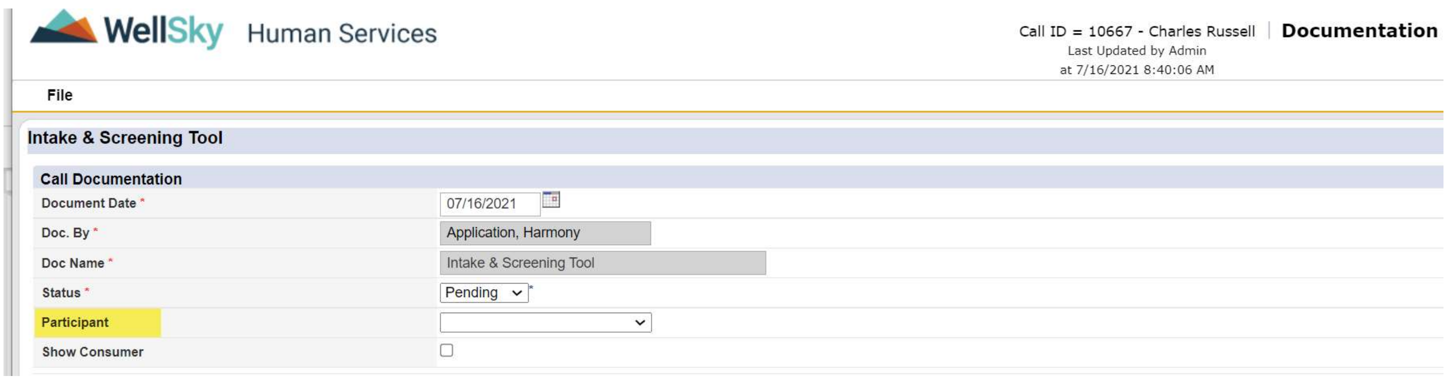
## Intake and Screening Tool

1. Click on **Documentation** to open the screening tool.
2. Select the **Intake and Screening Tool** from the list view grid.




Documentation list page

3. The Intake and Screening Tool will display.




Intake & Screening Tool

4. Select a participant from the Participant dropdown list.
5. Review the information provided.

## CONSUMER STATUS

### Are you or the person you are contacting us about:

| | |
|---|---|
| A Rhode Island resident who lives in the state more than 1/2 a year?* | Yes |
| A youth with an intellectual/developmental disability or a serious, chronic and disabling condition who is turning age 19 or 21?* | No |
| Expected to need health care services and supports for a period that is likely to last more than a month? | No |
| Have any of the following health conditions, illnesses or disabilities caused this need for services and supports:* | A COVID infection and treatment<br>Accident or injury requiring medical treatment<br>A chronic medical condition (e.g. heart diseas<br>An intellectual/developmental disability (occur<br>Physical condition or disability affecting mobili<br>Substance use disorder (e.g., alcohol, Rx abu<br>Serious and persistent behavioral health cond<br><br>Selected: Memory loss (alzheimer's, dementia) |
| Receive any of the following care within the last month: | Treatment of a wound or pressure ulcer by a h<br>Daily monitoring by a skilled nurse (LPN or RN<br>Physical Therapy and/or occupational therapy<br>In patient psychiatric care<br>Treatment with IV medication<br>Hospital stay of 3 days or more<br>Treatment for a substance use disorder<br><br>Selected: At home health care |
| Experience a fall within the last month | No |
| Are you or the person you are contacting us about currently living in a nursing home and would like assistance leaving the nursing home? | No |

## HEALTH COVERAGE

| | |
|---|---|
| Health Insurance Information: Do you or the person you are contacting us about have any of the following types of health coverage? Please check all that apply.* | VA Health Coverage<br>Medicare<br>Private or Employer Insurance<br>HealthSource RI Plan<br>Rhody Health Partners or Rite Care Plan<br>Medicaid All Other<br>Medicaid Application Pending<br><br>Selected: Medicaid LTSS |

## FINANCIAL INFORMATION

| | |
|---|---|
| Do you or the person you are contacting us about receive any of the following?* | Supplemental Security Income (SSI)<br>Veterans Administration (VA) Benefits<br>Other<br>None<br>Retirement, Survivors and Disability Insurance<br>Pension or Retirement Plan<br><br>Selected: Social Security Disability Insurance (SSDI) |
| Which of the following best describes the income you/the person have on a monthly basis?* | Between $2,300 - $4,500 / month |
| Are you or the person you are contacting us about married? If so, and tell us the combined total resources/assets of both spouses when responding to the question below: | No |

Intake & Screening Tool

| | |
|---|---|
| What are the total financial assets/resources of the consumer (cash, checking, savings, CD, bonds, etc.) ? (IF SINGLE)* | Between $4,000 - $10,000 |

## LIVING ARRANGEMENT

| | |
|---|---|
| Which of the following best describes where you/the person live(s) now?* | Living with Family/Friends |
| If you/the person reside(s) in a home-like setting (house, apartment, condo, etc.), which of the following best describes who else lives there? | Other relatives/friends |

## ASSISTANCE WITH DAILY ACTIVITIES

In this section, we would like to know more about the areas of daily life where some type of assistance may be needed by you or the person you are contacting us about.

▲ Hide Text

Do you/the person need help on most days with any of the following: (Check all that apply)

| | |
|---|---|
| Bathing (e.g., getting in and out of a shower/tub, using faucets, hair/body toweling) | ☐ |
| Dressing (e.g., putting on/taking off clothes, socks, shoes, or stockings) | ☐ |
| Toileting (e.g., getting on or off the toilet, wiping, or changing pads) | ☐ |
| Eating (e.g., eat, drink, using utensils, chewing/swallowing) | ☑ |
| Grooming (e.g., brushing teeth, combing hair, shaving, cutting nails) | ☐ |
| Managing Medications (e.g., filling prescriptions, taking pills/medicines as directed, keeping meds organized) | ☐ |
| Moving About (e.g., going from room to room or outside and back in without a walker or other assistive device) | ☑ |
| Physical transitions (e.g., getting up from or moving between a bed, a chair/wheelchair, or toilet without help) | ☐ |
| Housekeeping (e.g., general cleaning, dusting/vacuuming, washing dishes) | ☐ |
| Preparing Meals (e.g., planning, cooking, serving and clean-up) | ☑ |
| Shopping (e.g., grocery, clothes, prescriptions) | ☐ |
| Laundry (e.g., using washer/dryer, folding, putting laundry away) | ☐ |
| Handling Mail (e.g., opening, reading, responding) | ☐ |
| Managing Money (e.g., keeping accounts, paying bills, handling cash) | ☐ |
| Assistive Devices | Uses a Cane<br>Rollator<br>Uses a walker<br>Wheel-chair reliant<br>Other<br>Falls or is at risk of falling — Needs assistance moving |

Intake and Screening Tool

6. Scroll to the Intake and Screening Response Results Section to review the scoring.

## INTAKE & SCREENING RESPONSE RESULTS

| | |
|---|---|
| PCOC Recommended | Yes |

### High Priority

| | |
|---|---|
| Living Situation | No |
| Youth (IDD or Other Disability) Who is Turning 19 or 21 | No |

### Health Status & Cognition

| | |
|---|---|
| Behavioral Health | No |
| COVID | No |
| Substance Use | No |
| Physical Disability | No |
| Intellectual or Developmental Disability | No |
| Acquired or Traumatic Brain Injury | No |
| Memory Loss | Yes |

### Medicaid LTSS Financial Eligibility

| | |
|---|---|
| Already Receiving Medicaid LTSS | Yes |
| Eligible or Almost Certainly Eligible | No |
| Might be eligible | Yes |
| Most likely ineligible | No |

### Referrals

| | |
|---|---|
| Referral to NHTP | Yes |
| Referral to OSCIL | No |

| | |
|---|---|
| By checking this box, I hereby authorize the use or disclosure of my protected health information as described above. | ☑ |

Intake and Screening Tool > Intake and Screening Response Results

7. If **PCOC Recommended** = Yes, scroll back to the top and check **Show Consumer.**
8. Select **Save and Close Documentation** from the File menu.

**Note:**
If the prospective consumer will be referred to PCOC, checking the **Show Consumer** box will copy the documentation to the Consumer record.

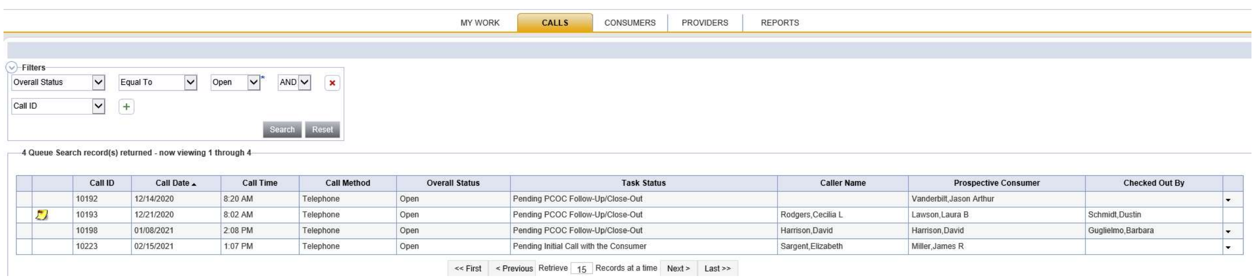
**9.** Skip to page 61 to continue with the PCOC Tool.

## Call Record and PCOC Process

Call records are available in the Calls Chapter. To access the record:

1. Click on the Calls Chapter.

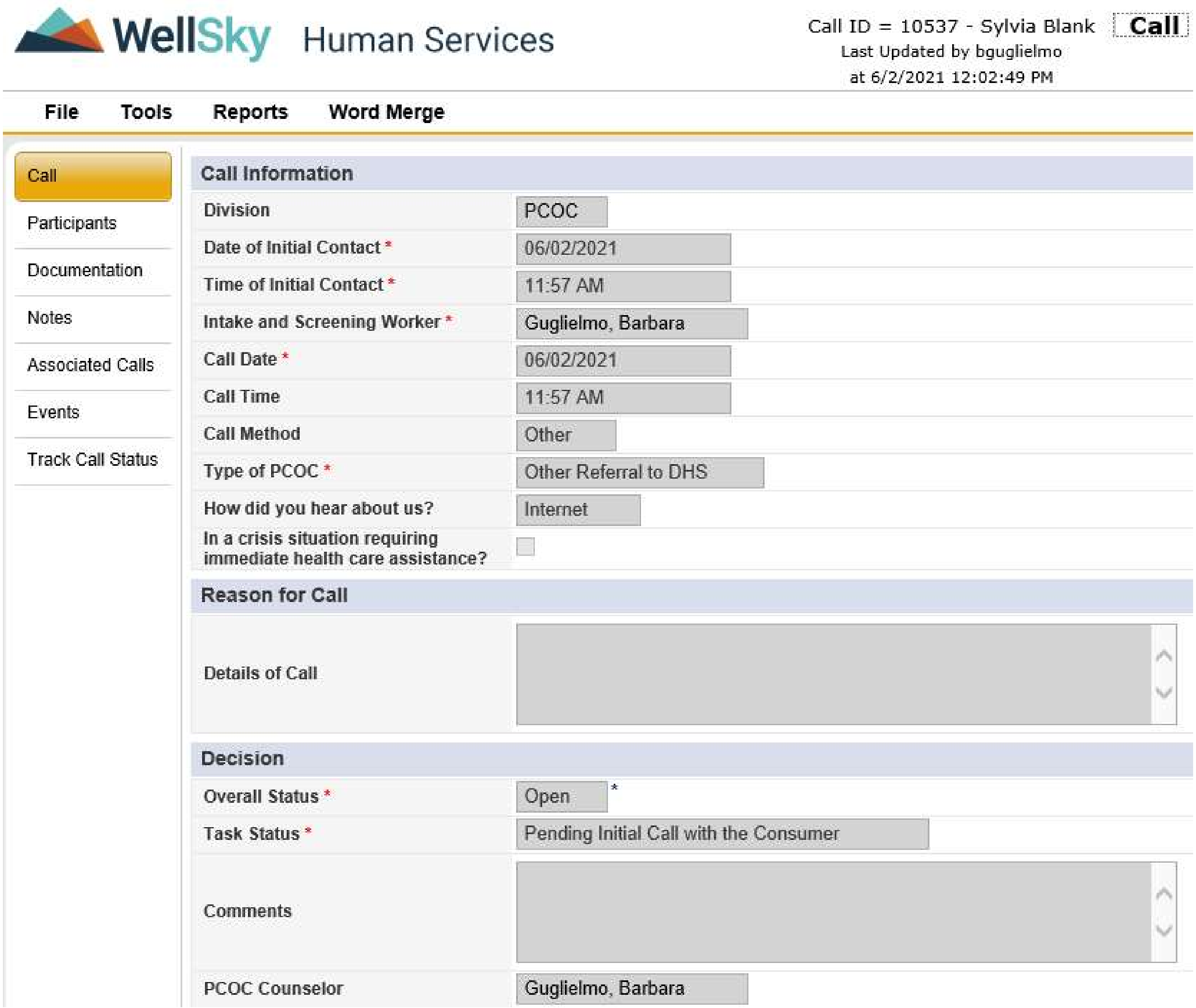

2. Select a record from the Call List Grid.




Call List Grid page

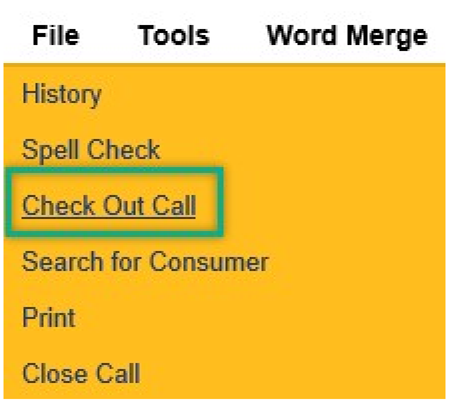
*The last column of the grid, **Checked Out By**, lets you know if another worker has the record checked out. If that is the case, you will be able to open the record to view only.*

3. The Call Details page will display.



Call Details page

4. Select **Check Out Call** from the File menu.



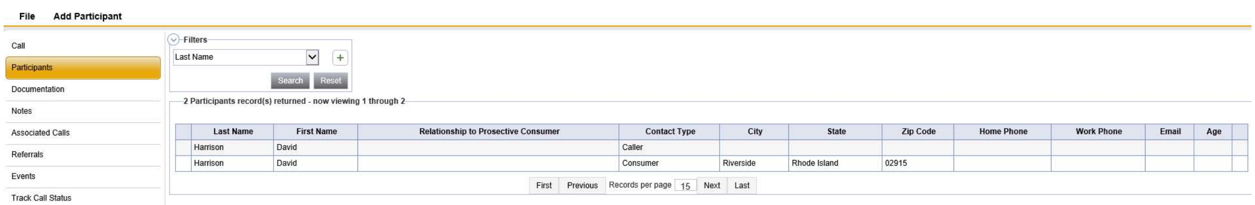
File menu

To navigate a call record, there are subpages on the left side of the page.

| Call Subpage | Description |
|---|---|
| **Call** | This page contains call and decision information. |
| **Participants** | This page contains information on the Caller, Consumer and Contacts. |
| **Documentation** | This page contains the intake & screening tool and the PCOC tool. |
| **Notes** | This page contains notes and attachments. |
| **Associated Calls** | This page allows the worker the ability to search and link other call records. |
| **Events** | Triggered Workflow Wizards appear, allowing the worker to see all events that have been triggered in the record. |
| **Track Call Status** | This page displays the status changes of the Call. |

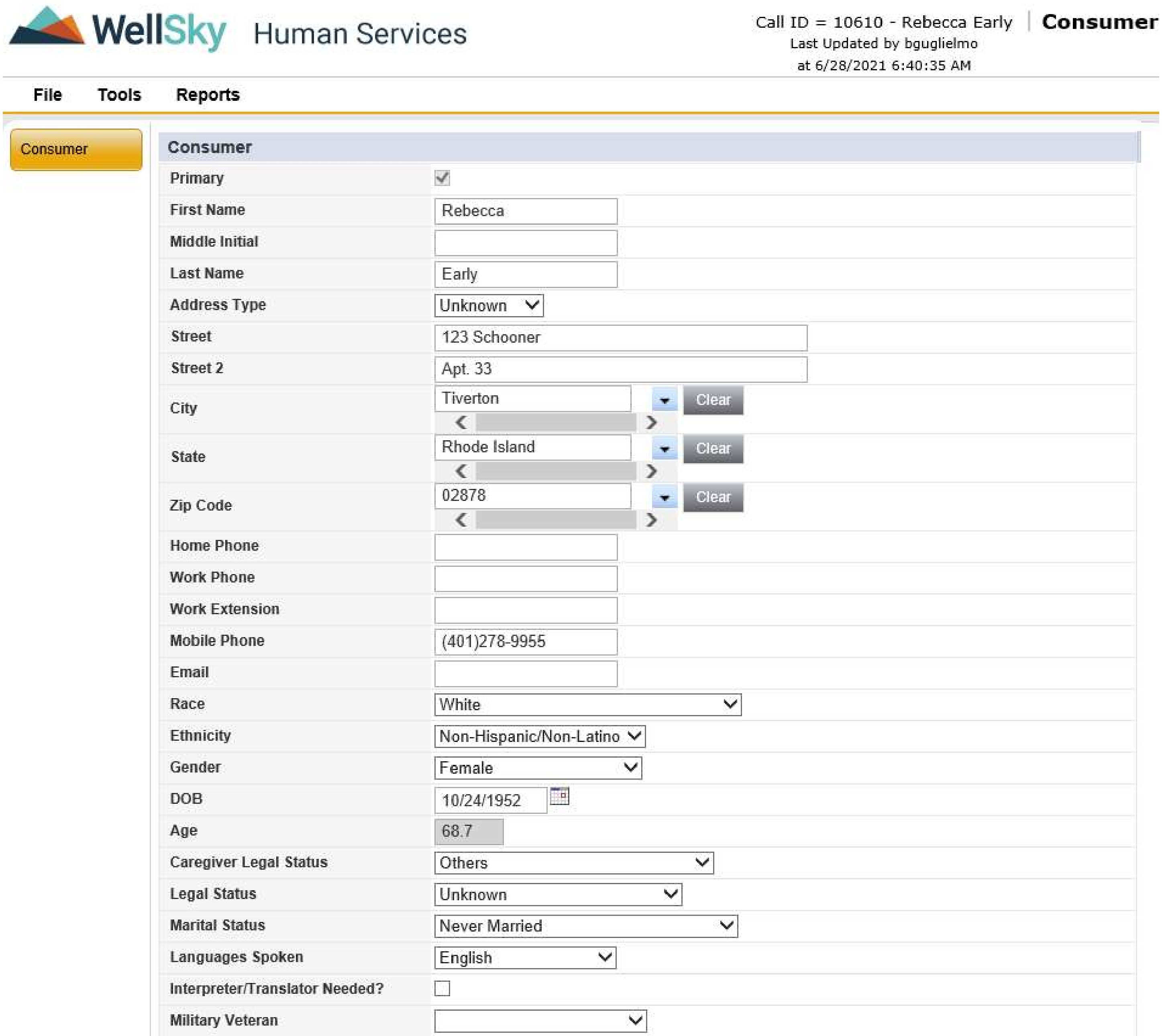
## Call Participants

1. Click on Participants subpage.
2. The Participant List page will display.



Call Participants List page

3. Select the Consumer from the grid.
4. The Participant details page will display.



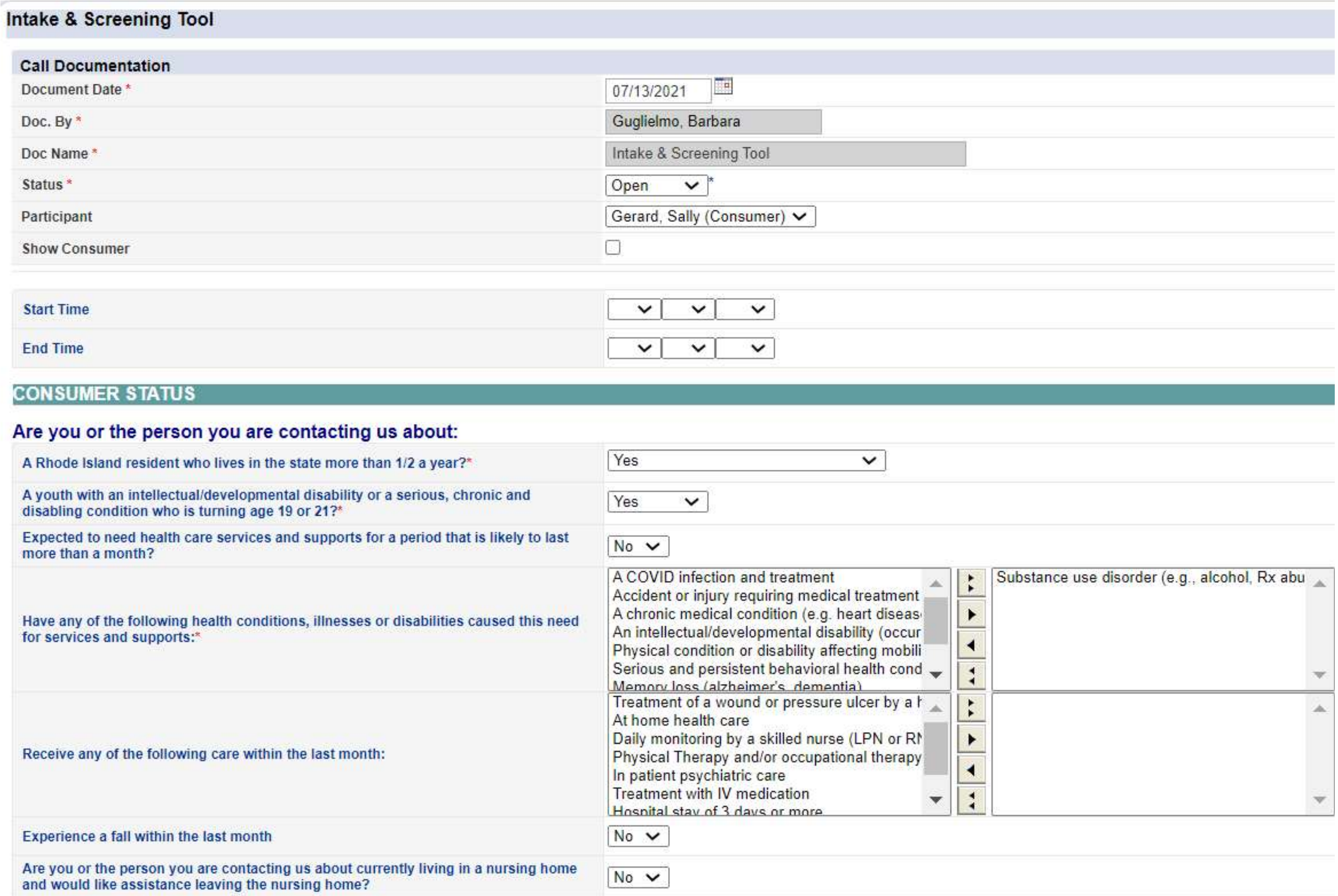
Consumer Details page

5. If necessary, add/edit information on the participant.
6. Select **Save and Close Consumer** from the File menu.
7. Follow steps 3-6 to view the Caller or Other Contacts information.

## Intake and Screening Tool

10. Click on **Documentation** to open the screening tool.
11. Select **Add Documentation** from the File menu.
12. The Documentation page will display.
13. Select **Intake and Screening Tool** from Please Select Type dropdown list.

Intake & Screening Tool



| | |
|---|---|
| **Call Documentation** | |
| Document Date * | 07/13/2021 |
| Doc. By * | Guglielmo, Barbara |
| Doc Name * | Intake & Screening Tool |
| Status * | Open |
| Participant | Gerard, Sally (Consumer) |
| Show Consumer | |
| Start Time | |
| End Time | |

**CONSUMER STATUS**

**Are you or the person you are contacting us about:**

| | |
|---|---|
| A Rhode Island resident who lives in the state more than 1/2 a year?* | Yes |
| A youth with an intellectual/developmental disability or a serious, chronic and disabling condition who is turning age 19 or 21?* | Yes |
| Expected to need health care services and supports for a period that is likely to last more than a month? | No |
| Have any of the following health conditions, illnesses or disabilities caused this need for services and supports:* | A COVID infection and treatment<br>Accident or injury requiring medical treatment<br>A chronic medical condition (e.g. heart diseas<br>An intellectual/developmental disability (occur<br>Physical condition or disability affecting mobili<br>Serious and persistent behavioral health cond<br>Memory loss (alzheimer's, dementia)<br><br>Selected: Substance use disorder (e.g., alcohol, Rx abu |
| Receive any of the following care within the last month: | Treatment of a wound or pressure ulcer by a h<br>At home health care<br>Daily monitoring by a skilled nurse (LPN or RN<br>Physical Therapy and/or occupational therapy<br>In patient psychiatric care<br>Treatment with IV medication<br>Hospital stay of 3 days or more |
| Experience a fall within the last month | No |
| Are you or the person you are contacting us about currently living in a nursing home and would like assistance leaving the nursing home? | No |

Intake & Screening Tool page

14. Complete the form.

**Note**

*If the field has a red asterisk (*), the field is required and must be populated in order to save the tool.*

15. At the bottom of the tool is a section, **Intake & Screening Response Results**.

## INTAKE & SCREENING RESPONSE RESULTS

| | |
|---|---|
| PCOC Recommended | No |
| **High Priority** | |
| Crisis Situation | No |
| Living Situation | No |
| Youth (IDD or Other Disability) Who is Turning 19 or 21 | No |
| **Health Status & Cognition** | |
| Behavioral Health | No |
| COVID | No |
| Substance Use | No |
| Physical Disability | No |
| Intellectual or Developmental Disability | No |
| Acquired or Traumatic Brain Injury | No |
| Memory Loss | No |
| **Medicaid LTSS Financial Eligibility** | |
| Already Receiving Medicaid LTSS | No |
| Eligible or Almost Certainly Eligible | No |
| Might be eligible | No |
| Most likely ineligible | No |
| **Referrals** | |
| Referral to NHTP | No |
| Referral to OSCIL | No |
| By checking this box, I hereby authorize the use or disclosure of my protected health information as described above. | ☐ |

Intake & Screening Response Results

16. If certain criteria are met, the value of the question will change from No to Yes. This information will help guide how you work with the Consumer.
17. Scroll to the top and select a value for the Status.
18. If **PCOC Recommended** = Yes, check the **Show Consumer** box.
19. Select **Save and Close Documentation** from the File menu.

## Practice #3 Exercise

**Practice Exercise #3**

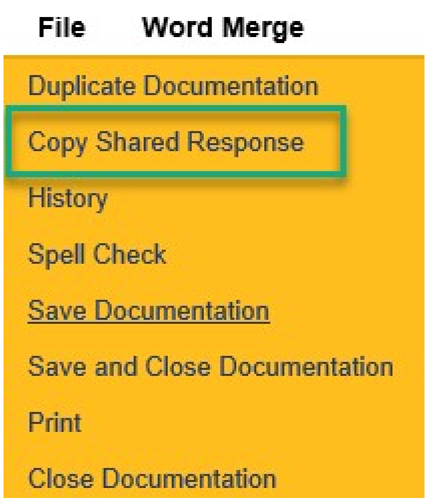
1. Review the participants records.
2. Complete the Intake & Screening Tool.

## PCOC Tool

1. Select **Add Documentation** from the File menu.
2. The Documentation page will display.
3. Select **PCOC Tool** from Please Select Type dropdown list.
4. Select the Consumer for the **Participant field.**


Documentation>PCOC Tool

5. Select **Copy Shared Response** from File menu.




Select Copy Share Response from File menu

6. Documents with Shared Response window will display. Select the Intake & Screening Tool in the grid.


Document with Shared Responses List Grid

7. The response results from the Intake & Screening Tool will appear at the top of the form.

INTAKE & SCREENING RESPONSE RESULTS

| | |
|---|---|
| PCOC Recommended | No |

**High Priority**

| | |
|---|---|
| Crisis Situation | No |
| Living Situation | No |
| Youth (IDD or Other Disability) Who is Turning 19 or 21 | No |

**Health Status & Cognition**

| | |
|---|---|
| Behavioral Health | No |
| COVID | No |
| Substance Use | No |
| Physical Disability | No |
| Intellectual or Developmental Disability | No |
| Acquired or Traumatic Brain Injury | No |
| Memory Loss | No |

**Medicaid LTSS Financial Eligibility**

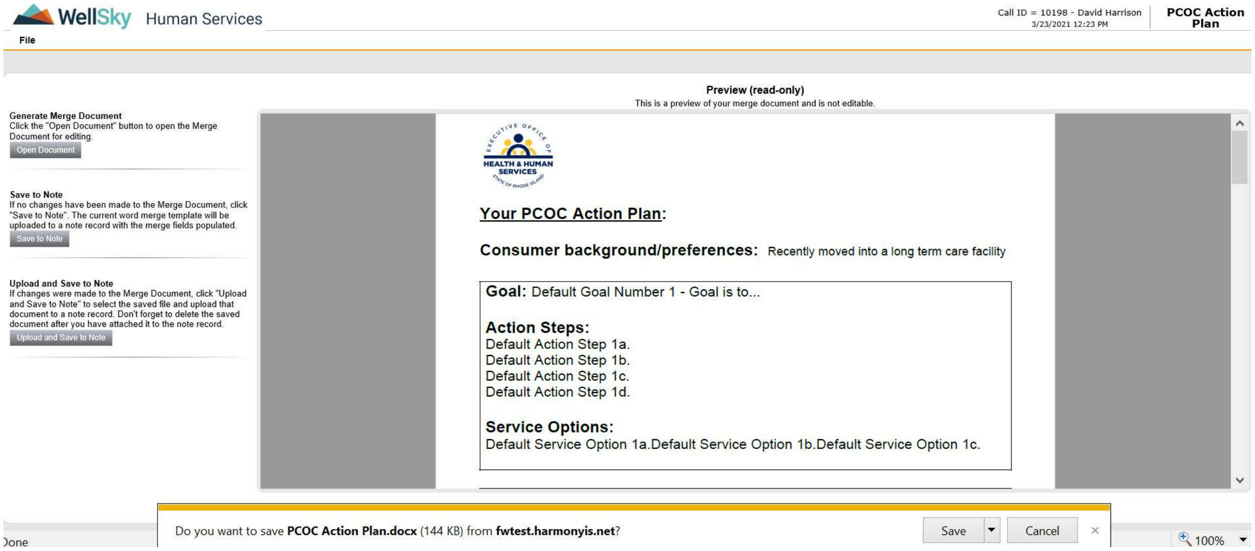
| | |
|---|---|
| Already Receiving Medicaid LTSS | No |
| Eligible or Almost Certainly Eligible | No |
| Might be eligible | Yes |
| Most likely ineligible | Yes |

Intake & Screening Response Results

8. Complete the form.
9. Scroll to the top and enter a value for the Status field.
10. If **PCOC Recommended** = Yes, check the **Show Consumer** box.
11. Select **Save Documentation** from the File menu.
12. The toolbar will now display **Word Merge**. Select **PCOC Action Plan** from the Word Merge menu.

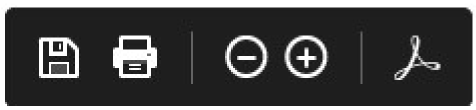

Click Word Merge from toolbar.

13. The Word Merge Editor window will display with the PCOC Action Plan.



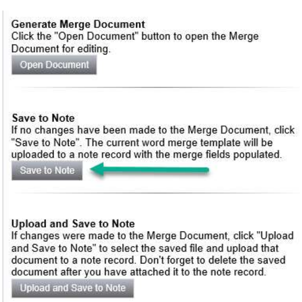
PCOC Action Plan Word Merge Letter

*If printing to share with consumer:*

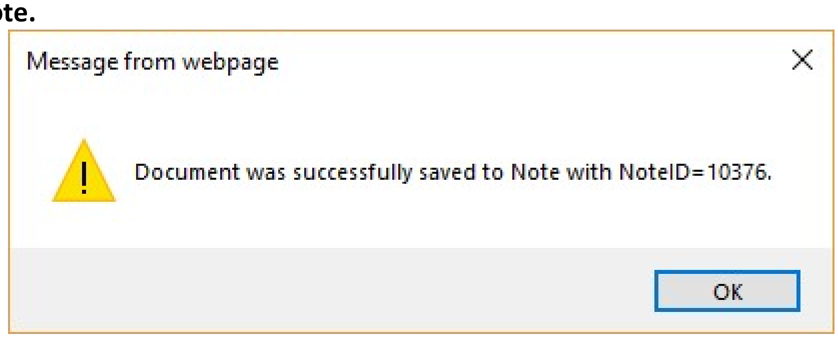


14. Click on the print icon and follow prompts to print.

*If saving to a note:*

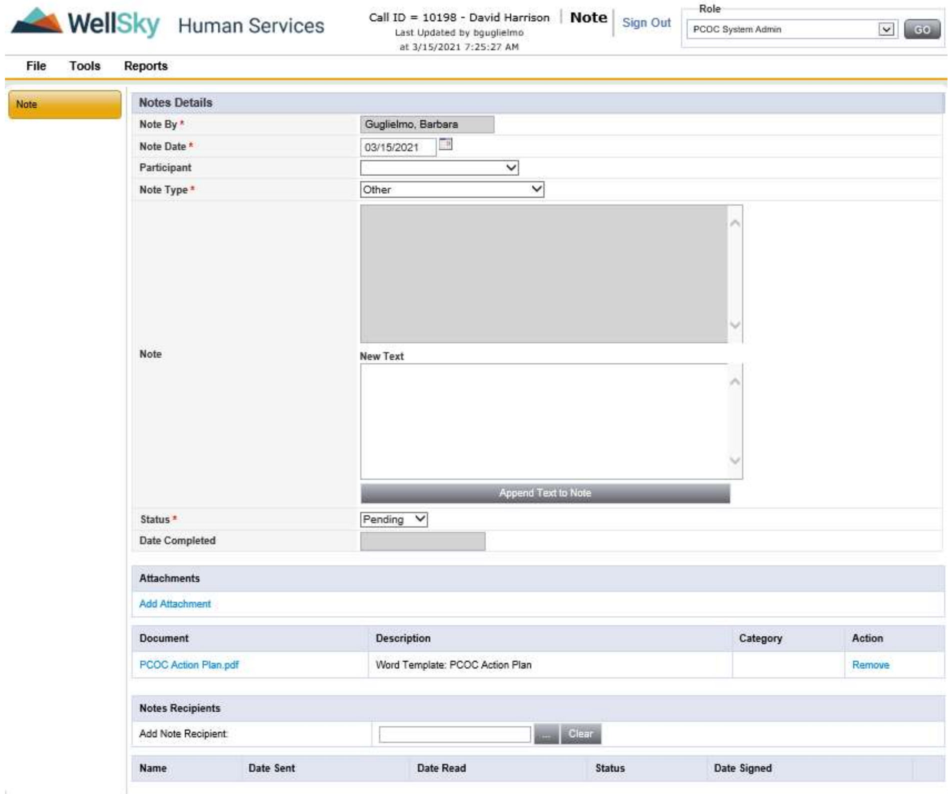



15. Click on **Save to Note.**



Message was successfully saved to Note.

16. Click **OK.**
17. The Notes Details page will display.



Note Details Page

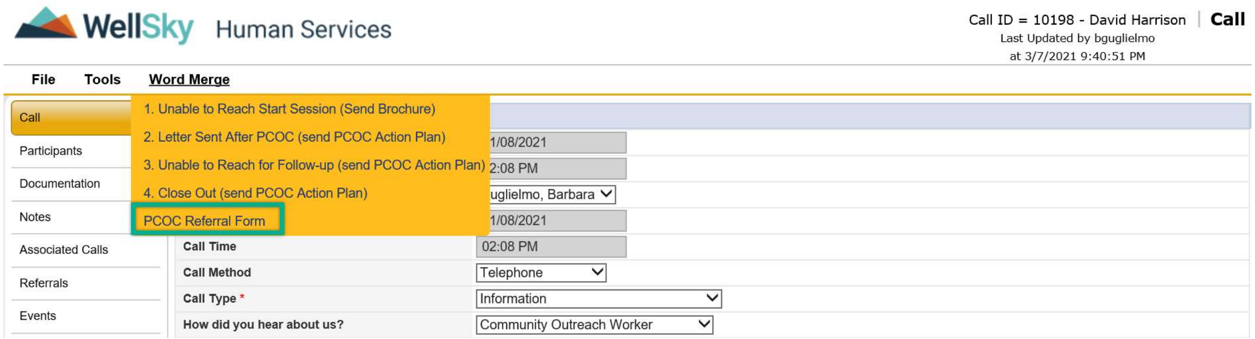
18. The Note By and Note Date fields will be pre-populated with User's name and Note creation Date.
19. Select the Consumer for the Participant field.
20. Change the Note Type from Other to **PCOC Action Plan**.
21. Enter Note details in the Note textbox. Click **Append Text to Note**. The note will transfer to the greyed-out text box.
22. Under the Document sub-header, you will see the attached document.
23. Change Status from Pending to **Complete.**
24. Select **Save and Close Note** from the File menu.
25. You will be returned to the PCOC Tool form.
26. Select **Save and Close Documentation** from the File menu.

## Practice Exercise #4

**Practice Exercise #4**
1. Complete the PCOC Tool.

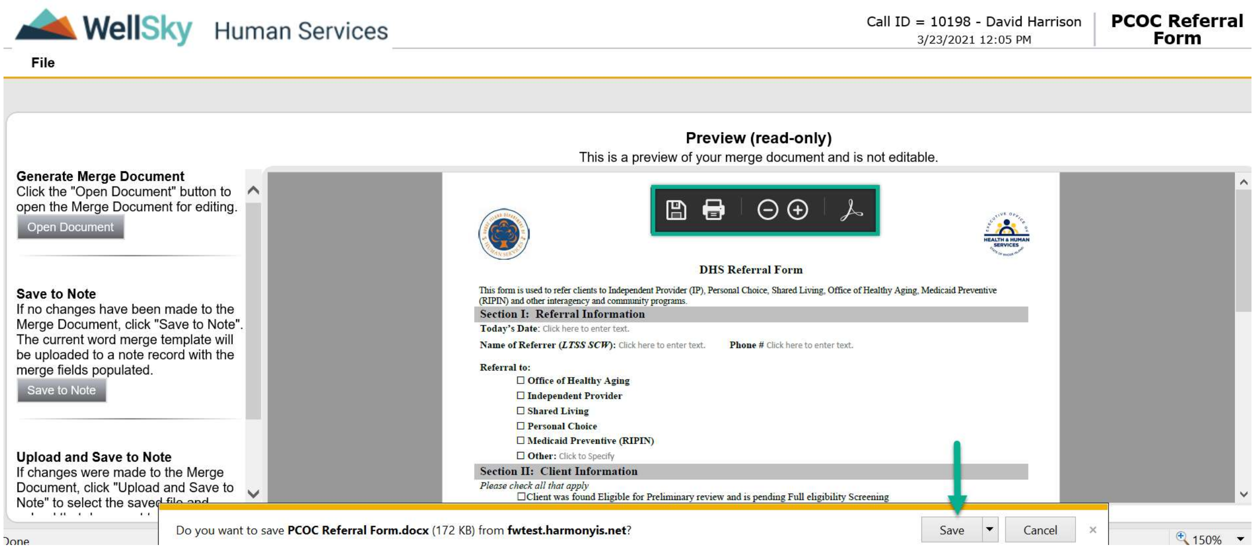
## PCOC Referral Form

1. Click on the Calls Subpage.



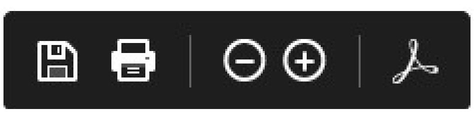
Select PCOC Referral Form from the Word Merge menu.

2. Select PCOC Referral Form from the Word Merge menu.



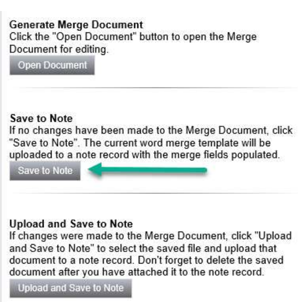
PCOC Referral Form

*If printing to share with consumer:*

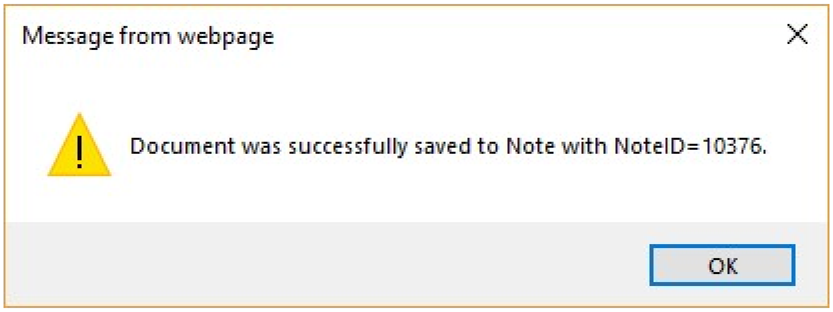


3. Click on the print icon and follow prompts to print**.**

*If saving to a note:*

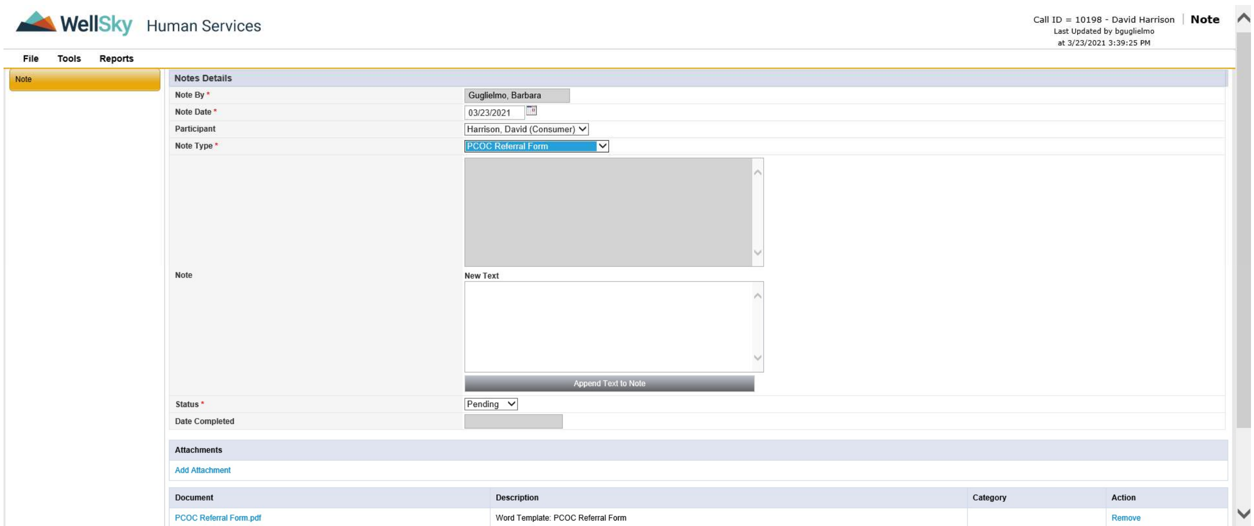



4. Click on **Save to Note.**



Message was successfully saved to Note.

5. Click **OK.**
6. The Notes Details page will display.



Note Details Page

7. The Note By and Note Date fields will be pre-populated with User's name and Note creation Date.
8. Select the Consumer for the Participant field.
9. Change the Note Type from Other to **PCOC Referral Form.**
10. Enter Note details in the Note textbox. Click **Append Text to Note**. The note will transfer to the greyed-out text box.
11. Under the Document sub-header, you will see the attached document.
12. Change Status from Pending to **Complete.**
13. Select **Save and Close Note** from the File menu.
14. You will be returned to the PCOC Tool form.
15. Select **Save and Close Documentation** from the File menu.

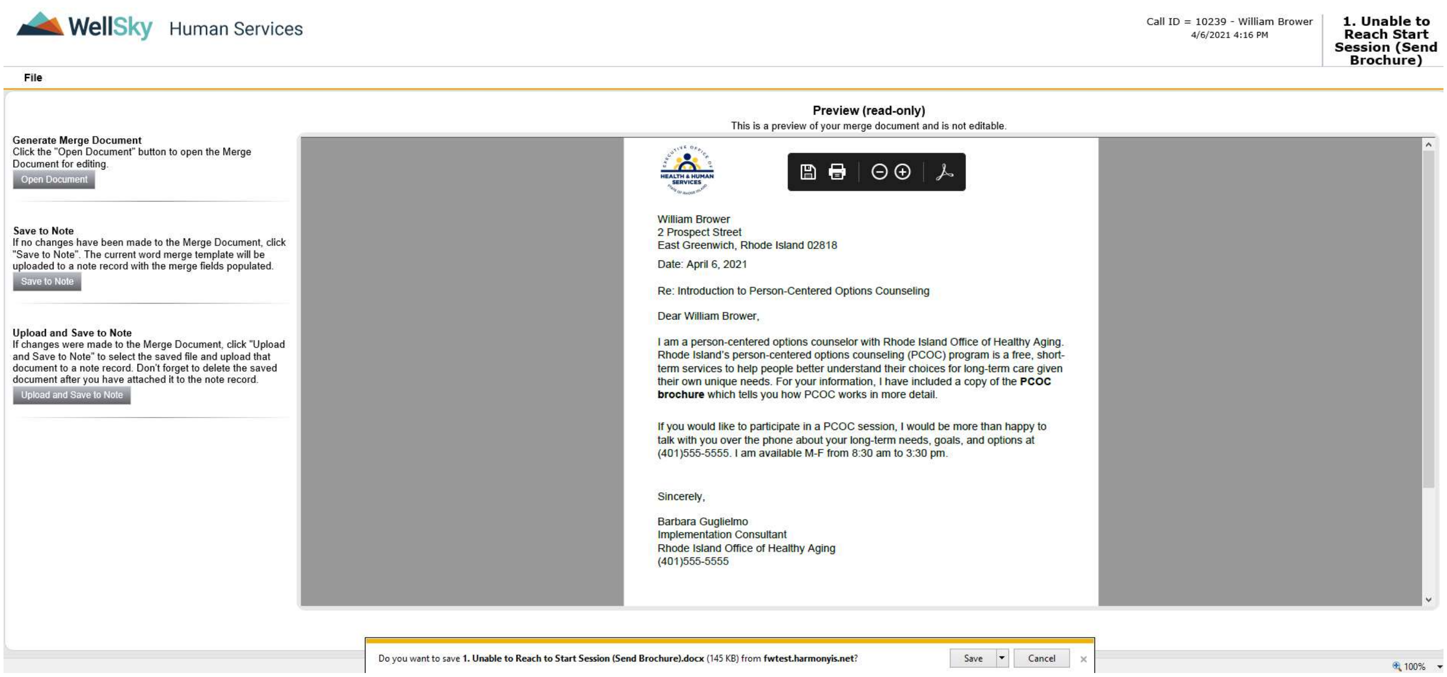
## Word Merge Documents

During the PCOC process, counselors may correspond with consumers using letters.

1. Return to the Call details page.
2. Select a letter from the Word Merge menu.

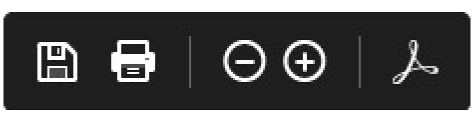

Word Merge file options

3. The Word Merge Editor window will open with the chosen letter displayed.




Word Merge Editor window

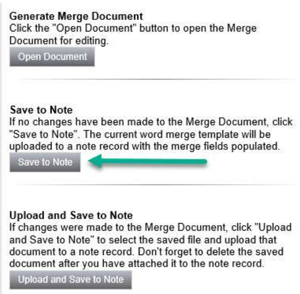
*If printing to share with consumer:*



Word Merge Toolbar

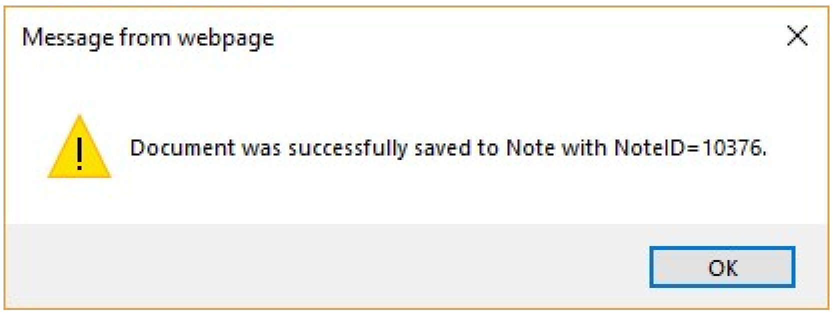
1. Click on the print icon and follow prompts to print.

*If saving to a note:*



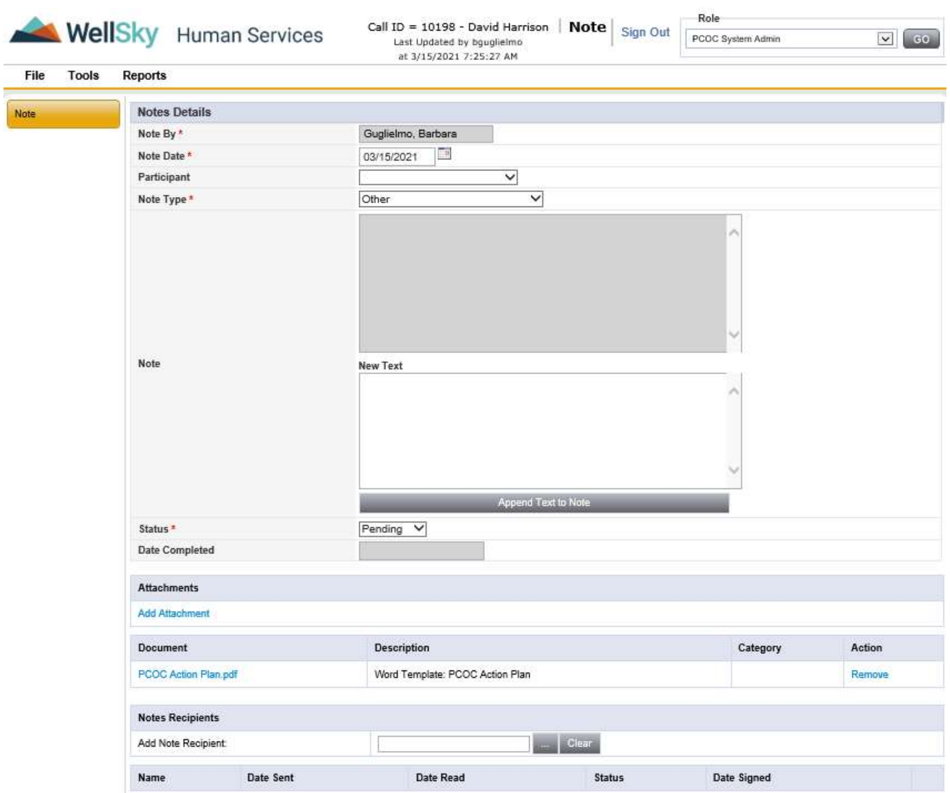

Word Merge options

2. Click on **Save to Note.**




Message was successfully saved to Note.

3. Click **OK.**
4. The Notes Details page will display.




Note Details Page

5. The Note By and Note Date fields will be pre-populated with User's name and Note creation Date.
6. Select the Consumer for the Participant field.
7. Change the Note Type from Other to the type of letter attached.
8. Enter Note details in the Note textbox. Click **Append Text to Note**. The note will transfer to the greyed-out text box.
9. Under the Document sub-header, you will see the attached document.
10. Change Status from Pending to **Complete.**
11. Select **Save and Close Note** from the File menu.

## Practice Exercise #5

**Practice Exercise #5**
1. Execute a Word Merge Letter.
2. Add a Referral.

## Decision & Check in Call

This section is used to document where in the process a counselor and consumer are in the workflow.

*If uninterested or unavailable:*

1. Click on the Calls details page.
2. Under the Decision section, change the Overall Status to equal **Complete**.
3. Change Task Status to equal **Closed**.
4. Select the activities completed for **What activities did you complete?**, if applicable.
5. Enter notes in the Comments field, if applicable.
6. Select a value(s) for Resolution.
7. Select **Save, Check in and Close Call** from File menu.

*If Information & Referral*:

1. Click on the Calls details page.
2. Under the Decision section, change the Overall Status to equal **Complete**.
3. Change Task Status to equal **Closed**.
4. For **What activities did you complete?**, select Information and Referral.
5. Enter notes in the Comments field, if applicable.
6. Select a value(s) for Resolution.
7. Select **Save, Check in and Close Call** from File menu.

*If Application Assistance*:

1. Click on the Calls details page.
2. Under the Decision section, change the Overall Status to equal **Complete.**
3. Change Task Status to equal **Closed**.
4. For **What activities did you complete?**, select Application Assistance.
5. Enter notes in the Comments field, if applicable.

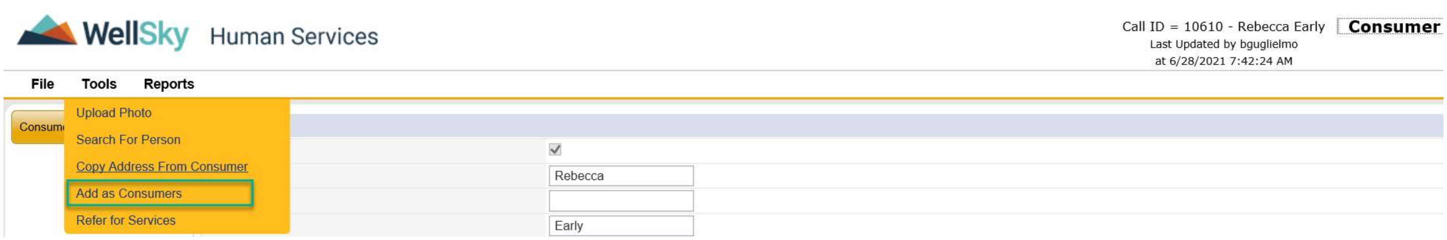
6. Select a value(s) for Resolution.
7. Select **Save, Check in and Close Call** from File menu.

*If Opt Out*:

8. Click on the Calls details page.
9. Under the Decision section, change the Overall Status to equal Complete.
10. Change Task Status to equal **Closed**.
11. Select the activities completed for **What activities did you complete?**, if applicable.
12. Enter notes in the Comments field, if applicable.
13. **Select Opt Out** for Resolution.
14. Select **Save, Check in and Close Call** from File menu.

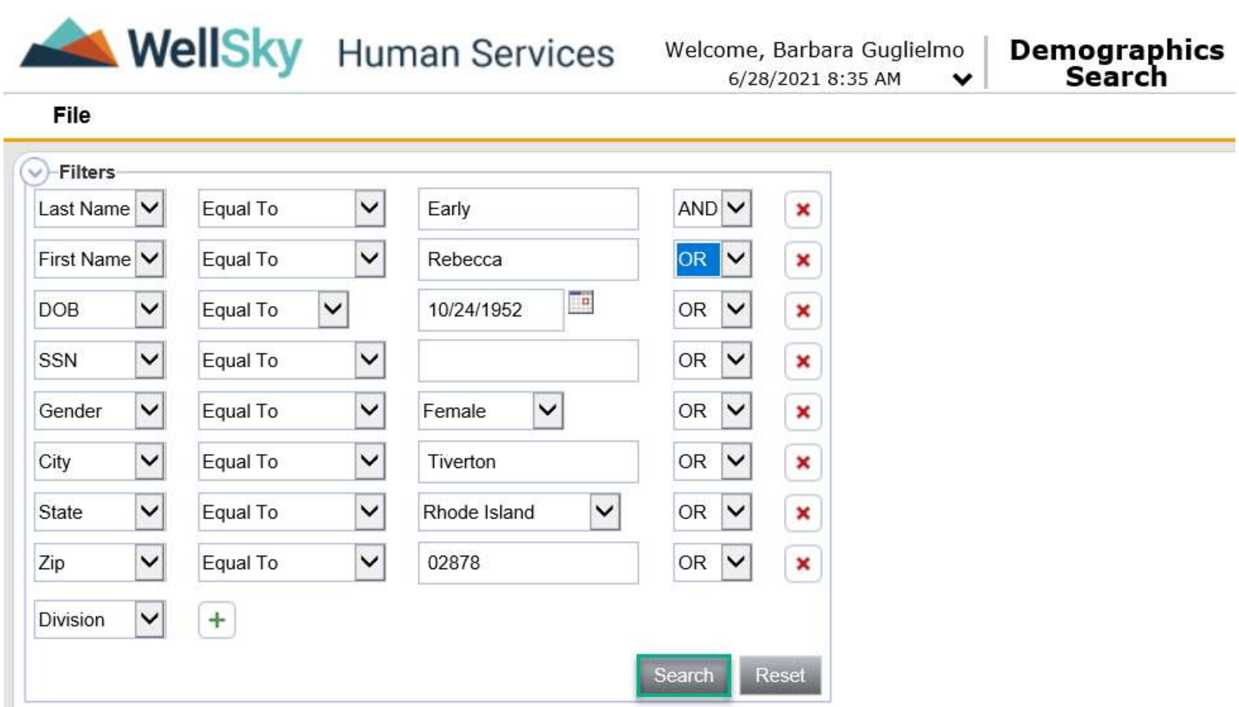
*If PCOC referral:*

1. Click on the Participants subpage.
2. Click on the Consumer record from the list view grid.
3. Select **Add as Consumers** from Tools menu.



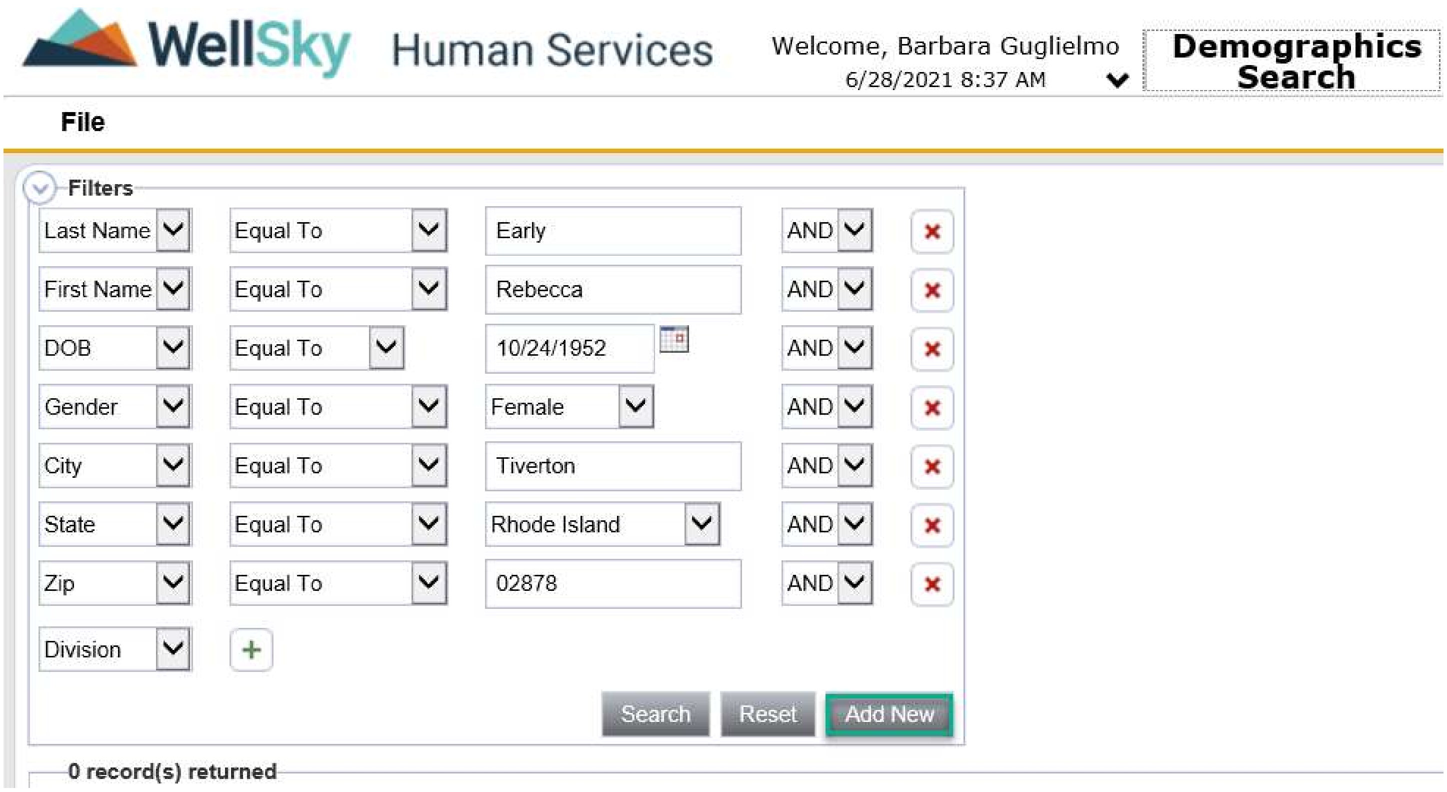
Select Add as Consumers from Tools menu

4. The Consumer Demographics Search window will display.
5. Criteria from the Consumer record will populate the search criteria.



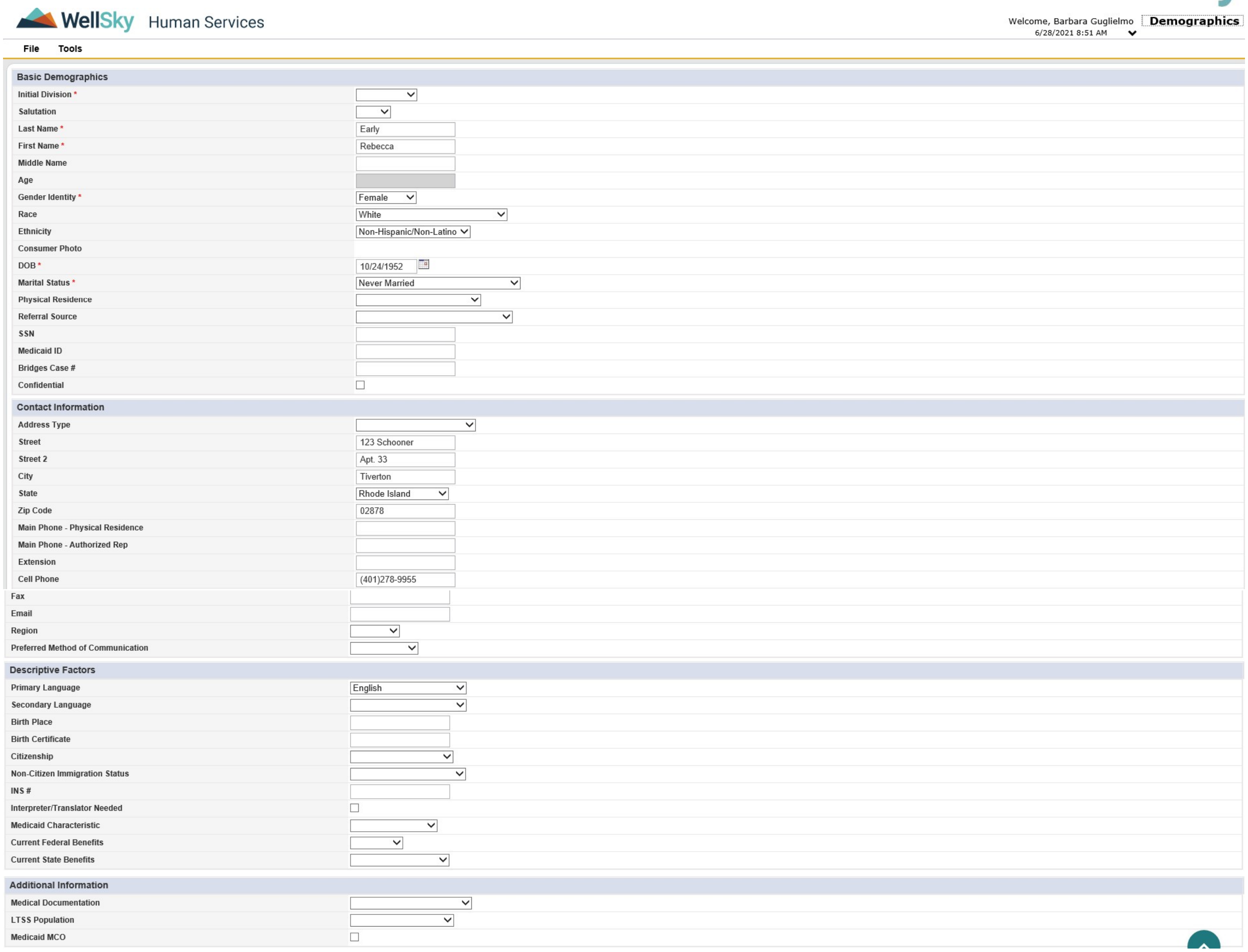
Demographics Search Page

6. Click Search. If no matches return, click **Add New.**



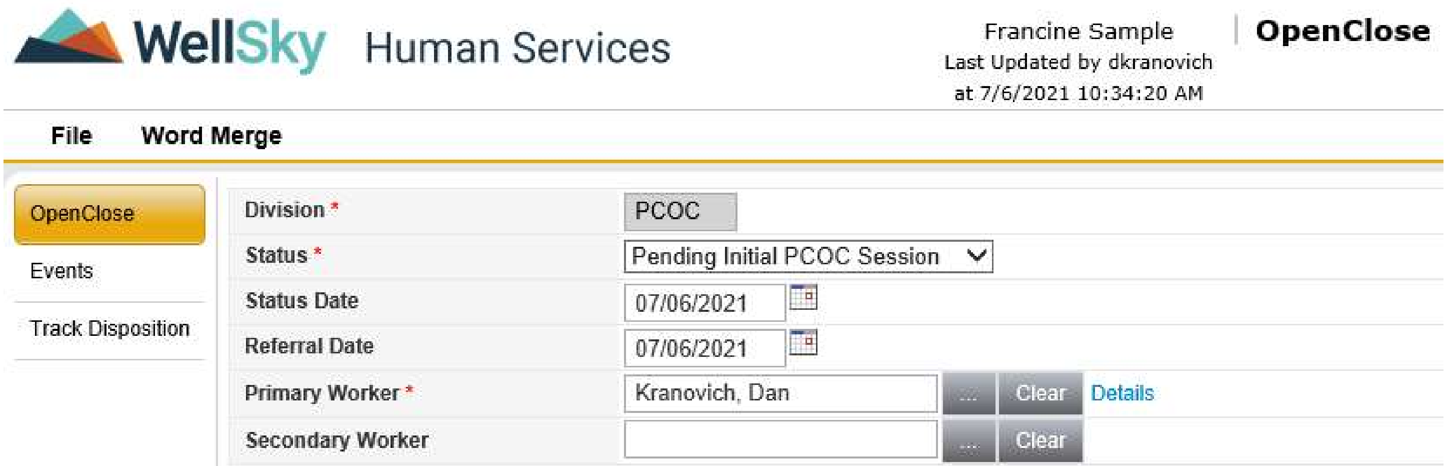
Demographics Search Page

7. The Demographics details page displays.



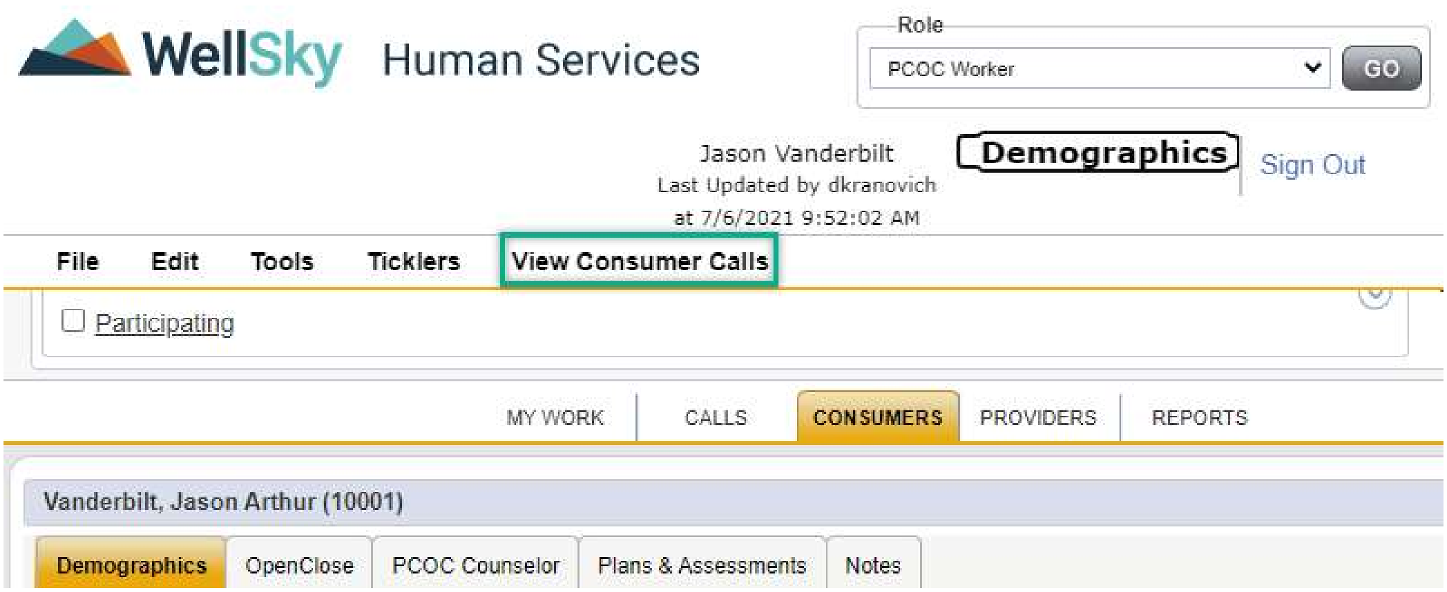
Consumer Demographics Details Page

8. Complete the fields on the page.
9. Select **Save and Close Demographics** from File menu.
10. The OpenClose details page displays.



OpenClose Details Page

11. Change the Status to **Pending Initial PCOC Session**.
12. Select **Save and Close OpenClose** from File menu.
13. Click on **View Consumer Calls.**



Click on View Consumer Calls

14. Select the call record from the list view grid.

Consumer Calls List Page

15. Under the Decision Section, change the Overall Status to equal **Complete**.

16. Change Task Status to equal **Closed**.
17. Enter the completed activities for **What activities did you complete?**
18. Enter notes in the Comments field, if applicable.
19. Select **PCOC Referral** for Resolution.
20. Select **Save, Check in and Close Call** from File menu.
21. Select **Close Consumer Calls** from File menu.

Consumer Calls List Page

**Note**
*If a consumer comes back (e.g., changes mind), please review **Unlocking a Call Record**, page 77.*

## Practice Exercise #6

**Practice Exercise #6**
1. Update the Decision section of a Call record.

## Practice Quiz

**Quiz #1**
1. True or False: My Work Chapter is where you add a Call record.
2. What role is used to Add a record?
3. True or False: Marital Status of Consumer is recorded on the PCOC Tool.
4. What page would you navigate to execute a Word Merge letter?
5. Where would you find the Intake & Screening Tool?
6. What is a People Search?
7. What is My Work?
8. What is the Task Status when a Consumer does not want to engage in PCOC?

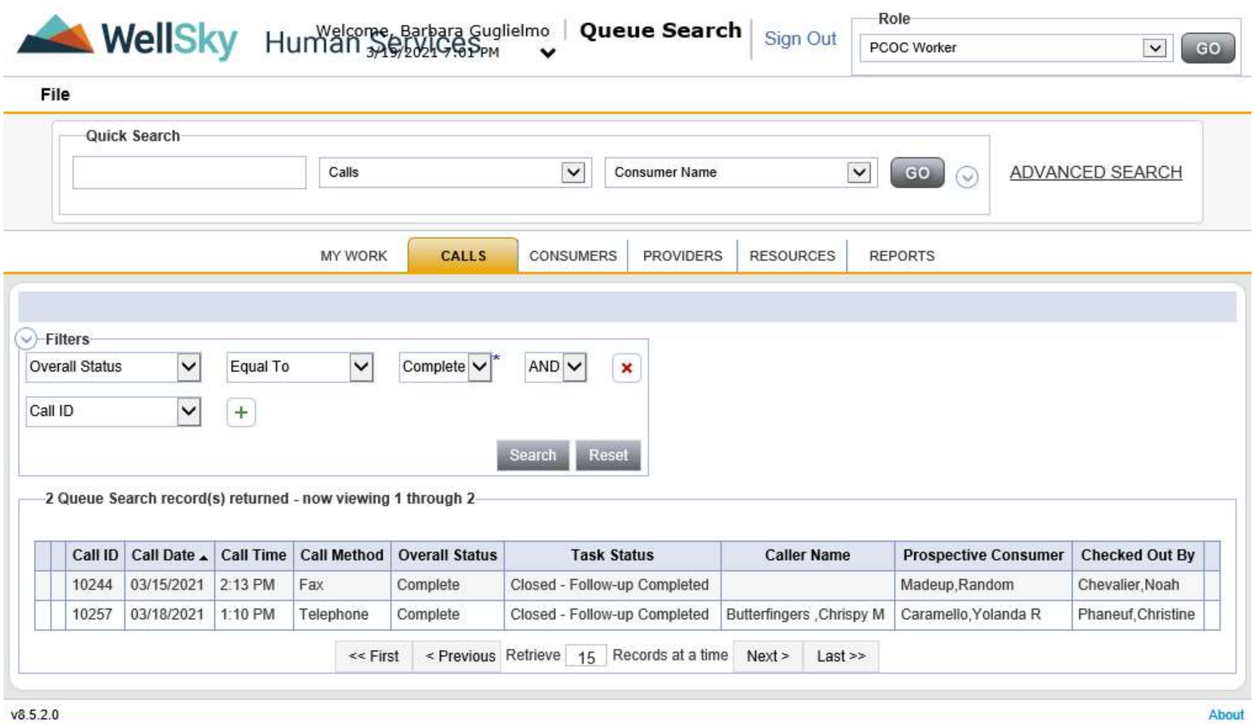
## Unlocking a Call Record

There may be circumstances where a counselor will need to unlock a call record (Prospective Consumer opt out/changed mind, Counselor able to contact Prospective Consumer, etc.)

1. Click on the Calls Chapter.

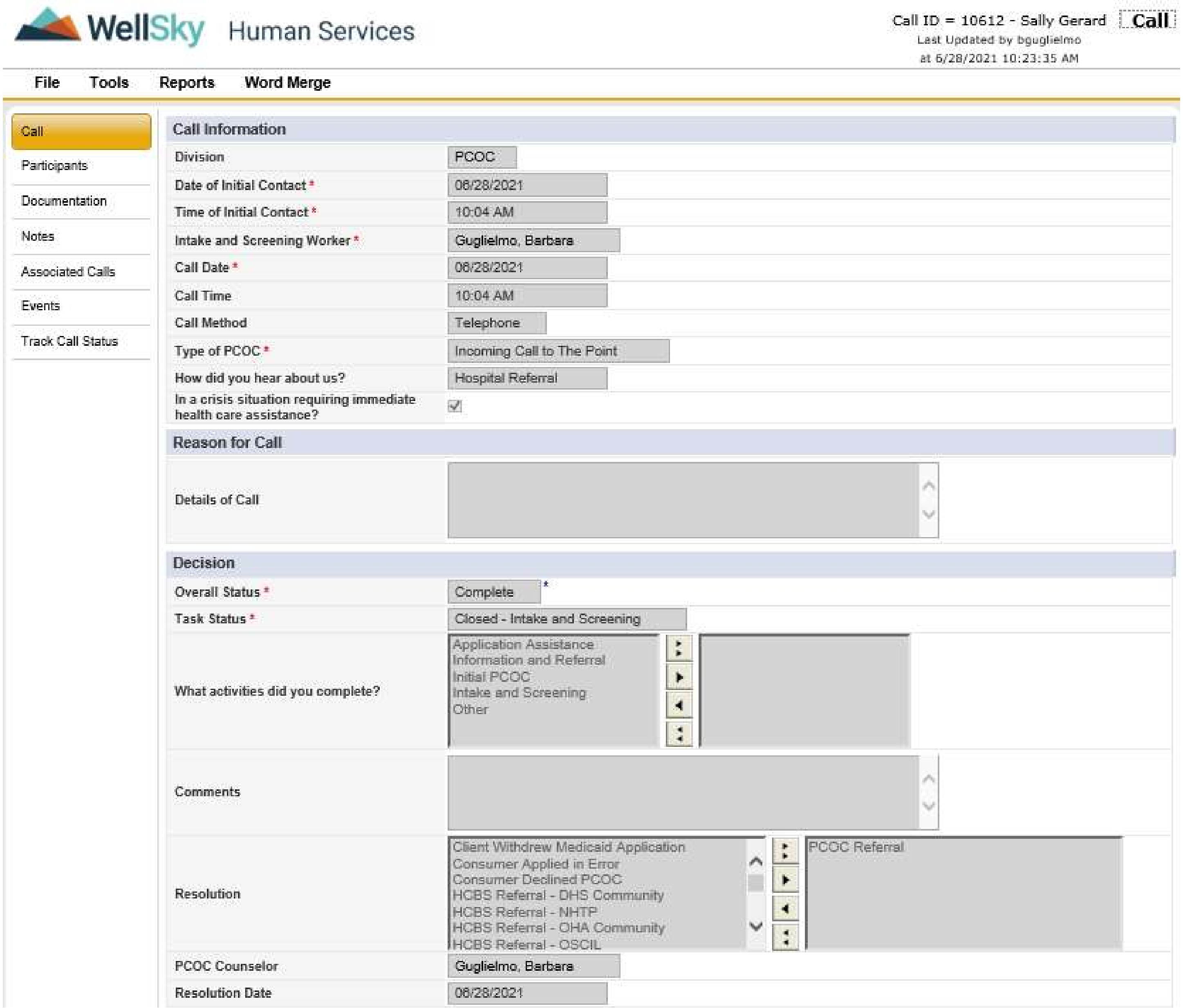

WellSky Chapters

2. Select a record from the Call List Grid.



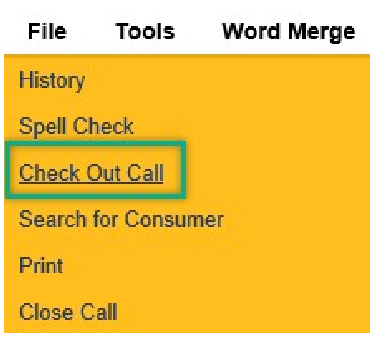

Call List Page

3. The Call Details page will display.



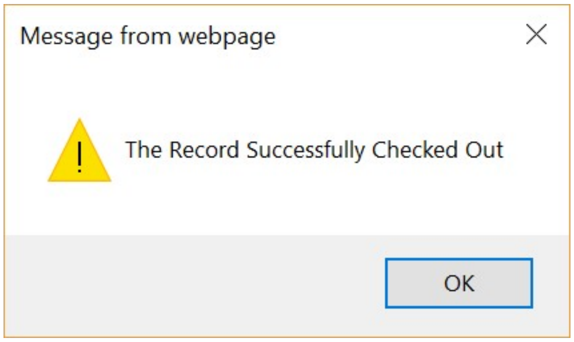
Call Details Page

4. Select **Check Out Call** from the File menu.



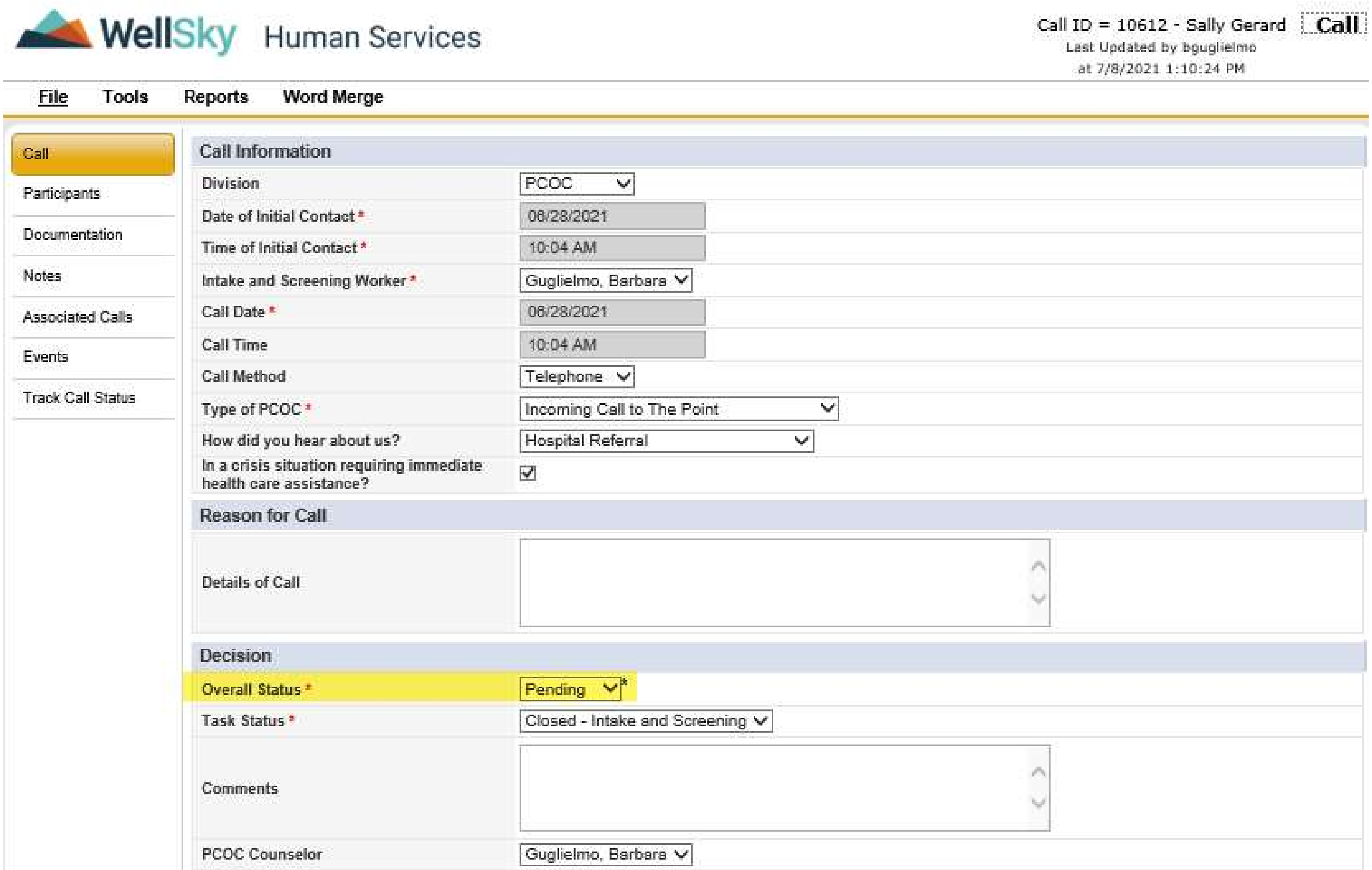
Select Check Out Call from File menu

5. A message will display. Click **OK**.




Message from webpage

6. Select **Reverse Disposition** from the File menu.

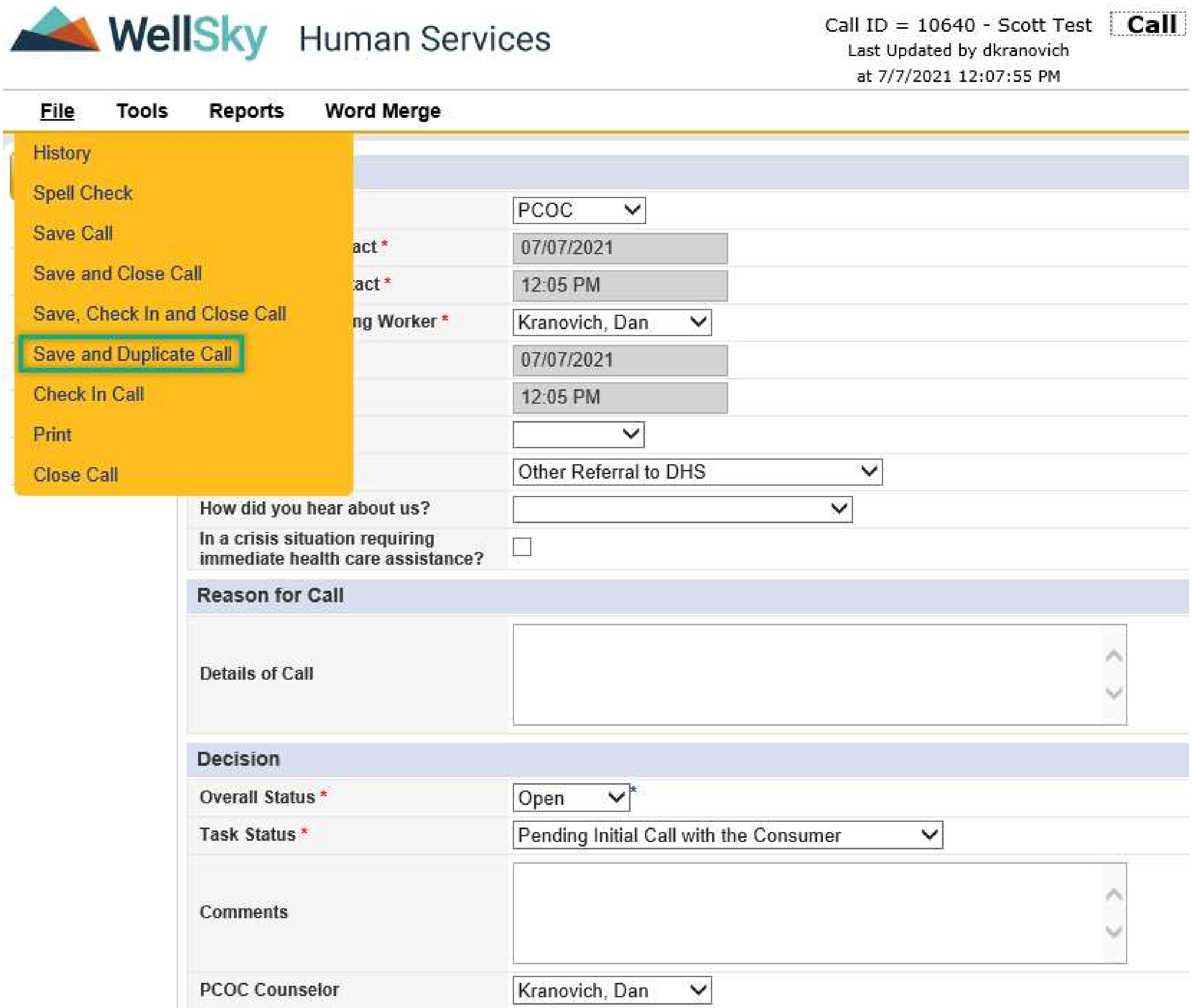



Call Details Page

7. The record is now editable. You are now able to document your work with the Prospective Consumer.

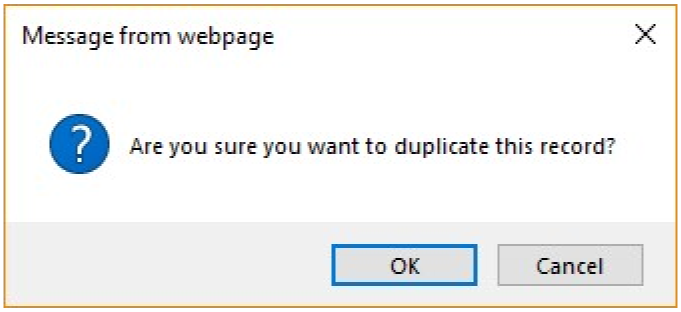
## Associating Call Records

1. From the Call Details page, select **Save and Duplicate Call** from the File menu.



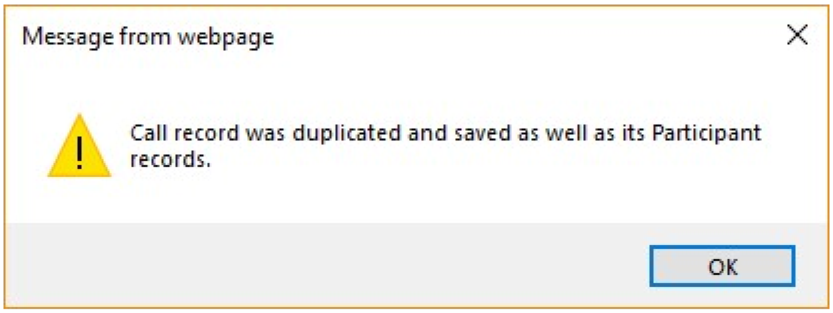
Call Details Page

2. A message will display. Click **OK.**



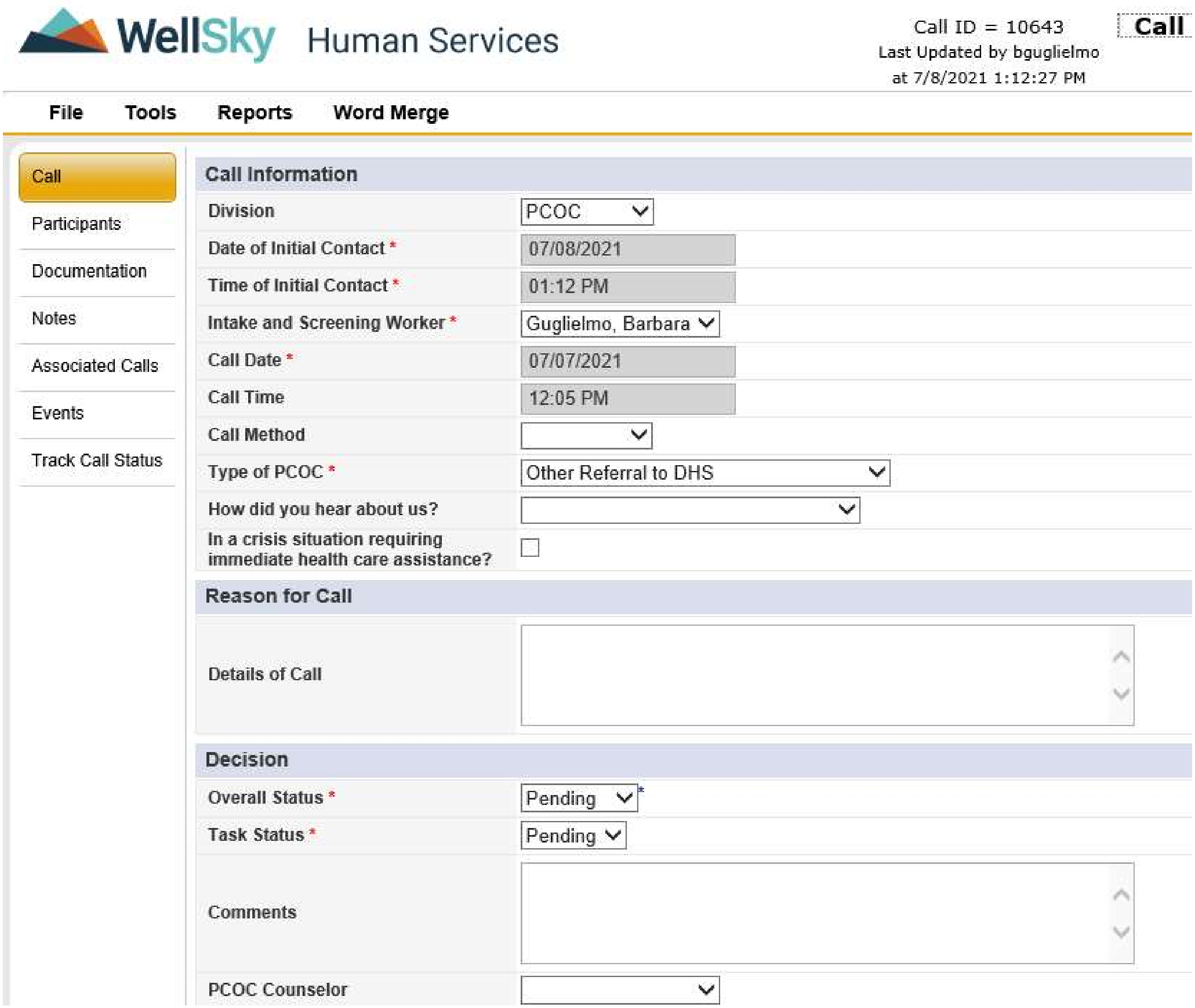
Message Dialog Box

3. Another message will display. Click **OK.**



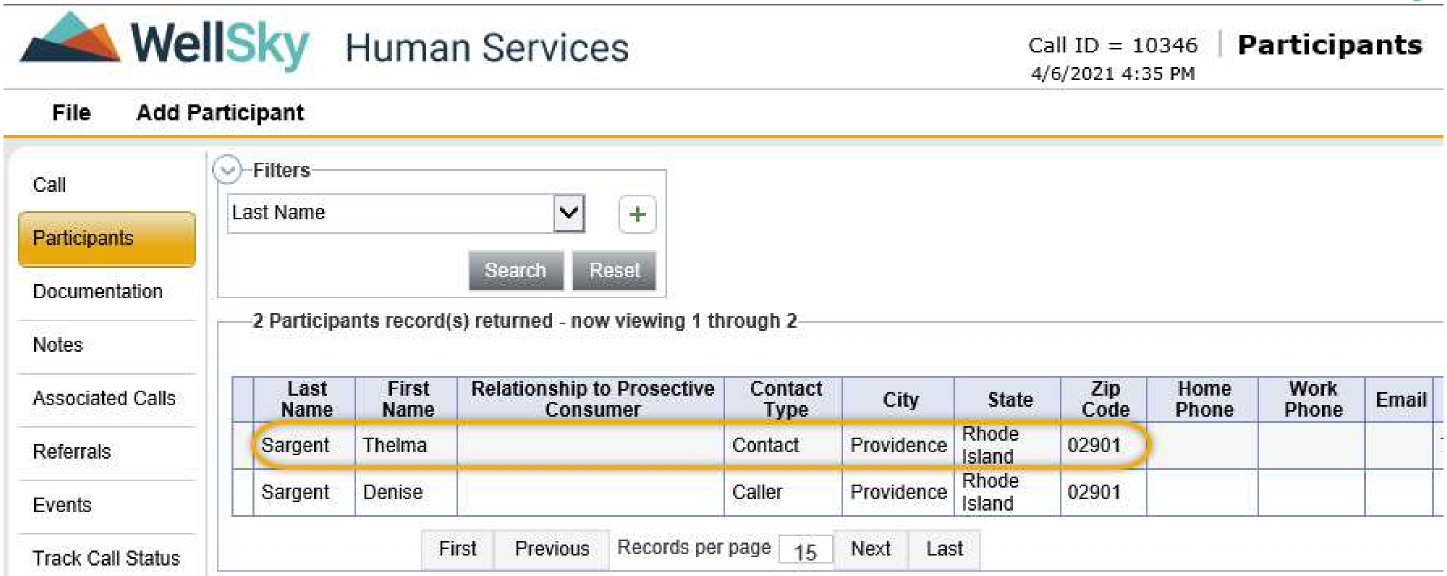
Message Dialog Box

4. The new Call record displays.



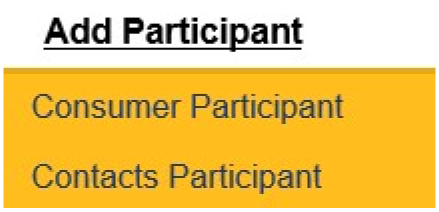
Call Details page

5. Click on the Participants Subpage.
6. The Prospective Consumer from the original call record is set to a Contact as seen below on the Participant List page.



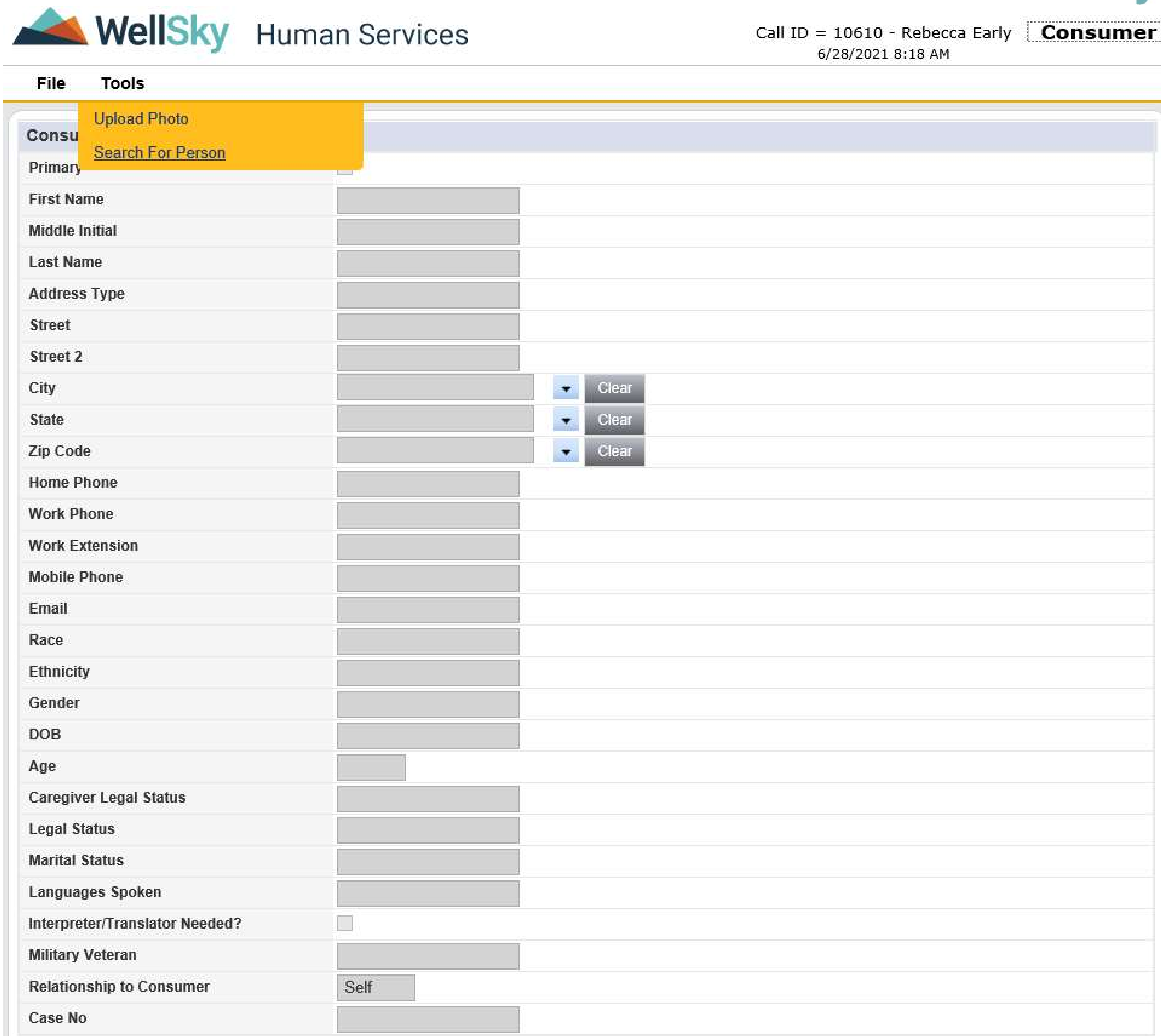
Call Participant List page

7. Select **Consumer Participant** from the Add Participant menu.



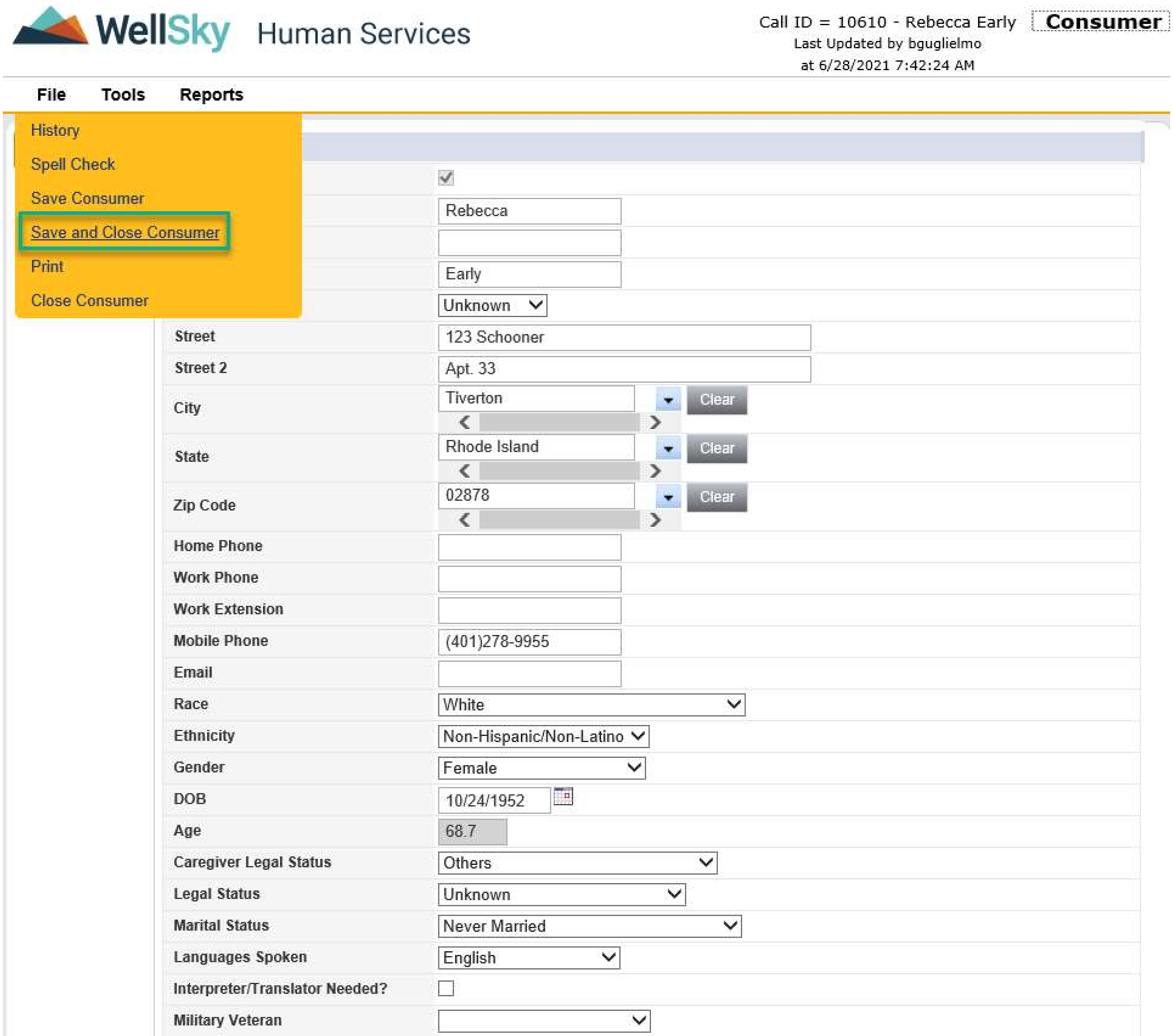
Add Participant File menu

8. The Consumer Details page will display.



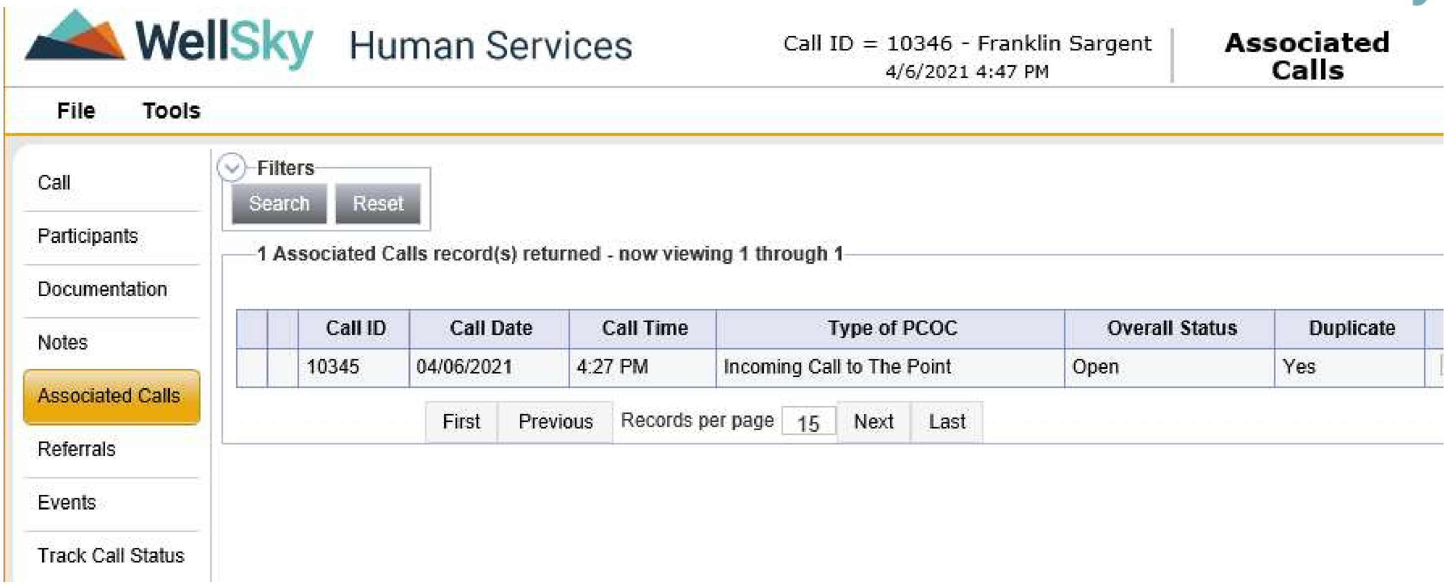
Prospective Consumer Details page

9. Select **Search for Person** from the Tools menu.
10. The People Search window will display.
11. Search for the person (Refer to page 21).
12. Complete the information on the Prospective Consumer details page.



Prospective Consumer Details page

13. Select **Save and Close Consumer** from the File menu.
14. Click on the **Associated Calls** subpage.
15. The list page will show the original Call record.



Associated Calls List page

## Practice Exercise #7

**Practice Exercise #7**
1. Update the Decision section of a Call record.

## Practice Quiz

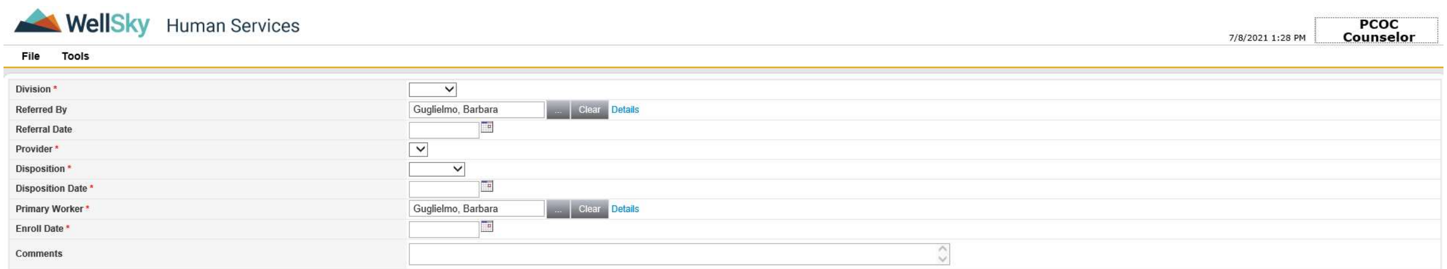
**Quiz #6**
1. True or False: My Work Chapter is where you add a Call record.
2. What role is used to Add a record?
3. True or False: Marital Status of Consumer is recorded on the PCOC Tool.
4. What page would you navigate to execute a Word Merge letter?
5. Where would you find the Intake & Screening Tool?
6. What is a People Search?
7. What is My Work?
8. What is the Task Status when a Consumer does not want to engage in PCOC?

## PCOC Workflow – from a Call record

1. Click on the Consumers Chapter.
2. Search and select the consumer from the list view grid.

### PCOC Counselor Tab

3. The Consumer Demographics list page displays.
4. Click on the PCOC Counselor tab.
5. Select **Add PCOC Counselor** from the File menu.
6. The PCOC Counselor details page displays.



PCOC Counselor Details Page

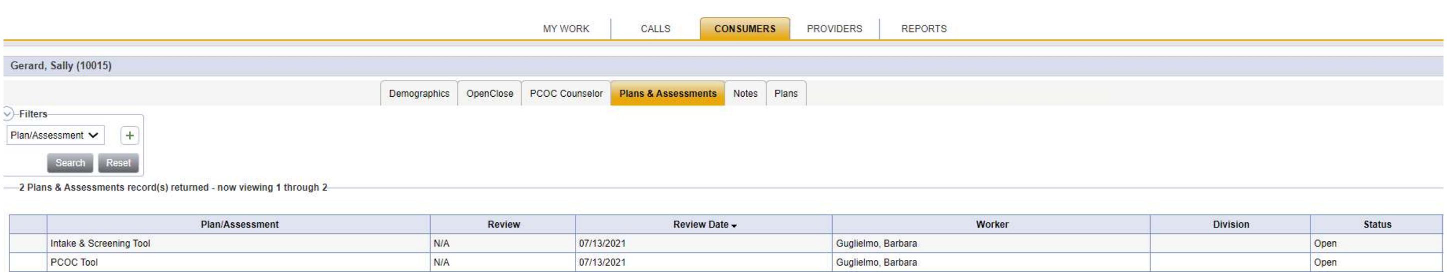
a. **Division**: Select PCOC.
b. **Referred By**: Displays the worker who created the consumer record.
c. **Referral Date**: Enter date referral was made.
d. **Provider**: Select from the dropdown list.
e. **Disposition**: Select **Open** from the dropdown list.
f. **Primary Worker**: Defaults to the worker creating the PCOC Counselor record.
g. **Enroll Date**: Enter date when consumer started working with Provider.
h. **Comments**: Enter notes, if applicable.

7. Select Save and Close PCOC **Counselor from the File menu.**

### Plans & Assessments Tab

If PCOC is started in the call record, the Intake & Screening Tool and the PCOC Tool will carry over into the Consumer Record.

1. Click on **Plans & Assessments** tab.
2. The Documents, Intake & Screening Tool and the PCOC Tool, from the Call record are available in the list view grid.



Plans & Assessments list page

3. Click on the PCOC Tool.

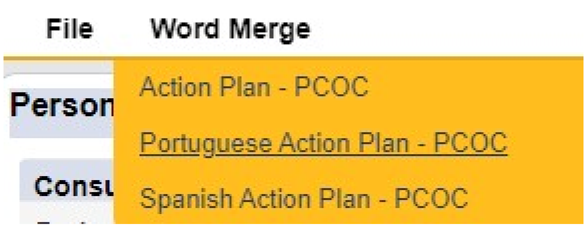
### If PCOC Referral Made Without Documentation

A consumer record can be created from a Call record without the PCOC Tool started.

1. Click on **Plans & Assessments** tab.
2. Select **Add Plan/Assessment** from the File menu.
3. From Please Select Type, Select **Person Centered Options Plan**.
4. Select **Open** for the Review field.

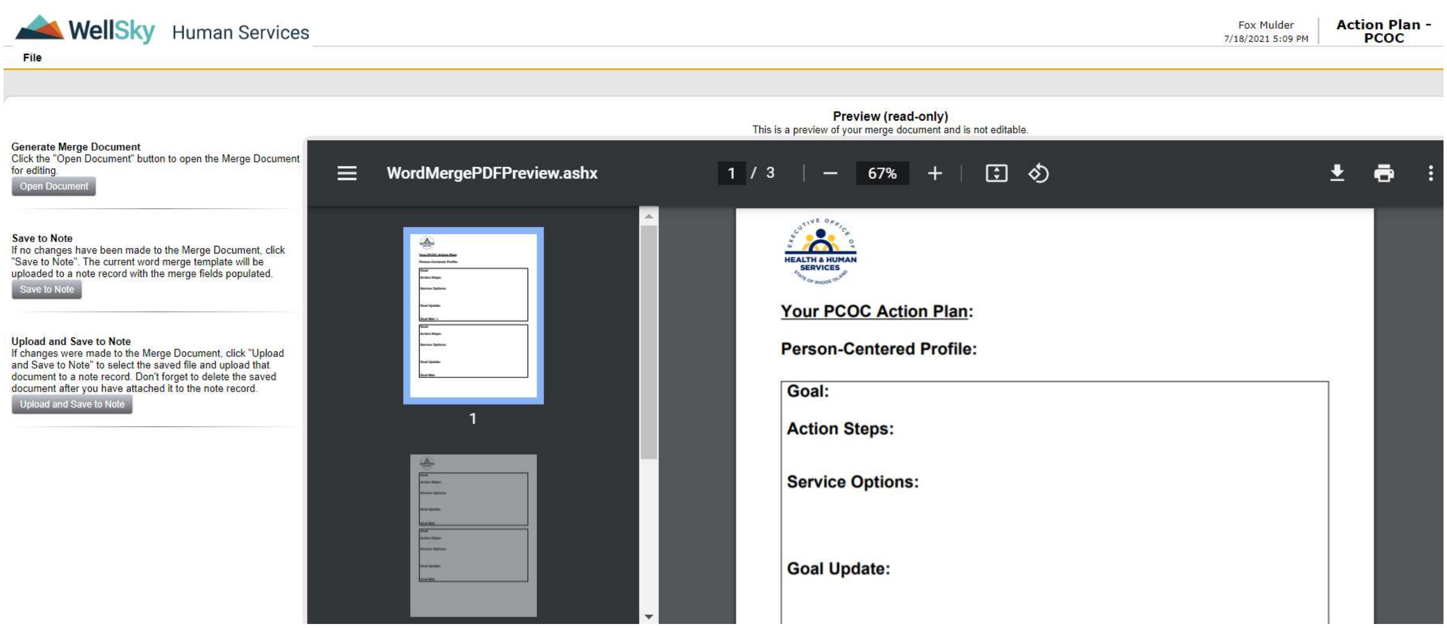
Person Centered Options Plan

5. Complete the form.
6. Change the Status to **Pending.**
7. Select **Save Plan/Assessment** from the File menu.
8. Select an Action Plan from the Word Merge menu.



Word Merge Menu

9. The Word Merge Editor window will open, displaying the Person Centered Action Plan.



Word Merge Editor window

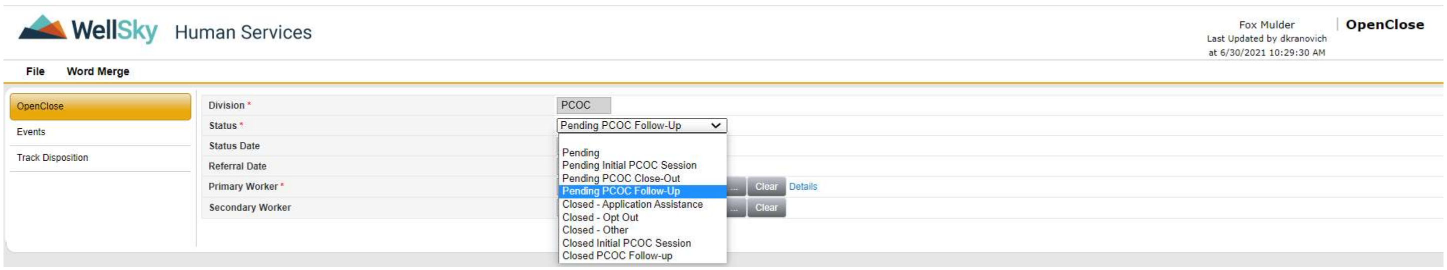
10. Go to page 64 to complete next steps.

## PCOC Status in the Consumer Record

This section is used to document where in the process a counselor and consumer are in the workflow.

### *Documenting the PCOC Status*:

1. Click on the OpenClose tab.
2. Click on the OpenClose record in the list view grid.
3. Select the value from the Status field.

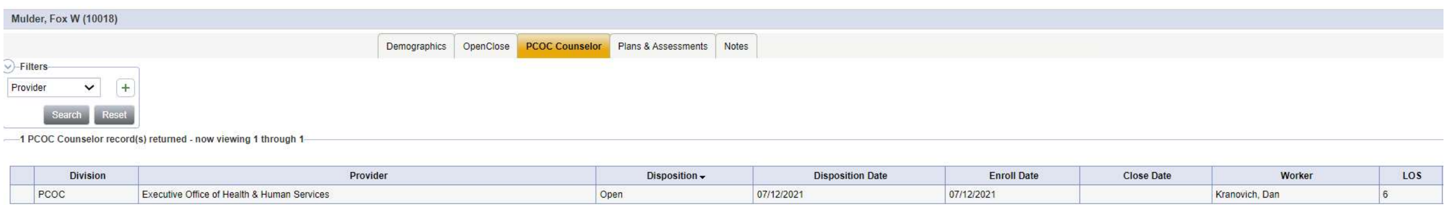



OpenClose Details Page

4. Select **Save and Close OpenClose** from File menu.

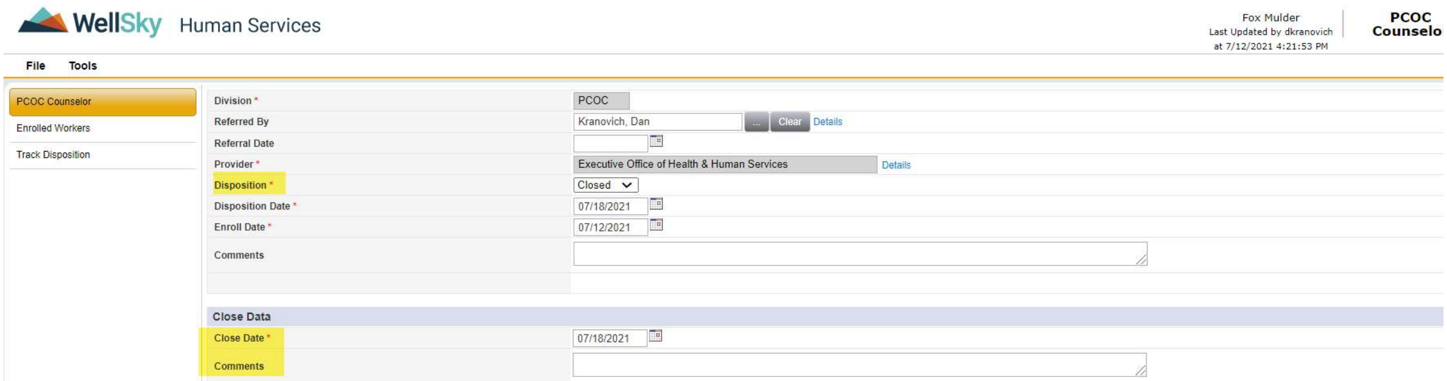
### *PCOC Closure (Opt Out, Application Assistance, Other, Initial PCOC Follow-Up or PCOC Follow-UP)*

1. Click on the PCOC Counselor tab.
2. Click on the PCOC Counselor record in the list view grid.




PCOC Counselor List Page

3. The PCOC Counselor Details page displays.
4. Change the Disposition to Closed.

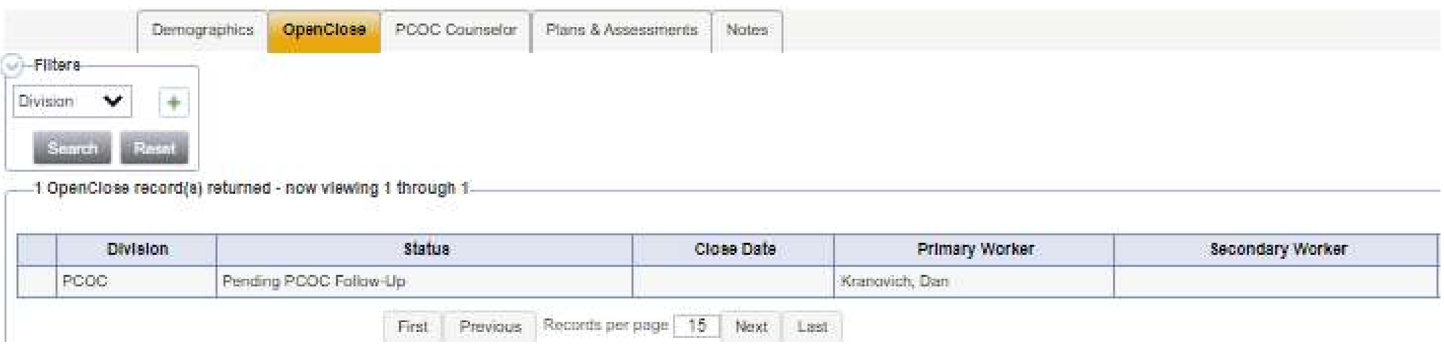


PCOC Counselor Details Page

5. Enter Comments under the Close Data.
6. Select **Save and Close PCOC Counselor** from File menu.
7. Click on the **OpenClose** tab.

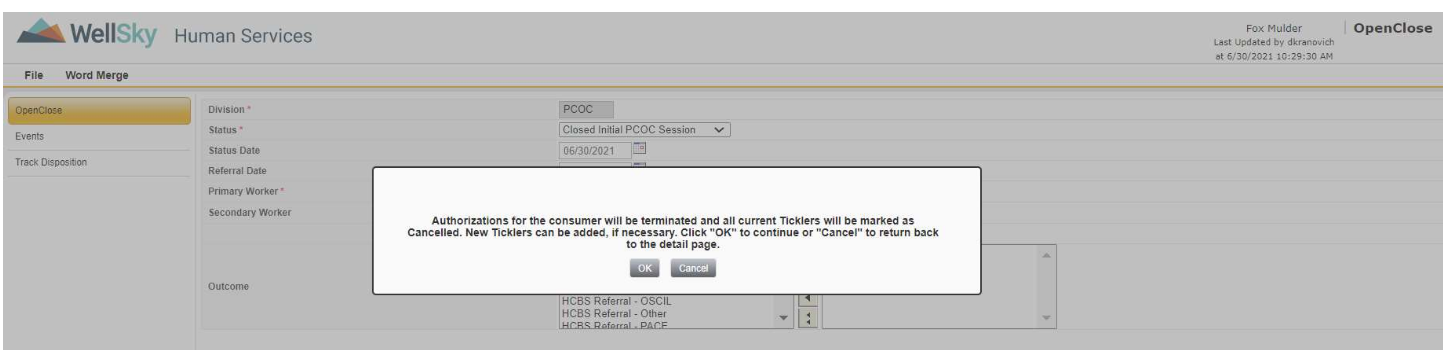
Consumer Chapters

8. Click on the OpenClose record in the list view grid.



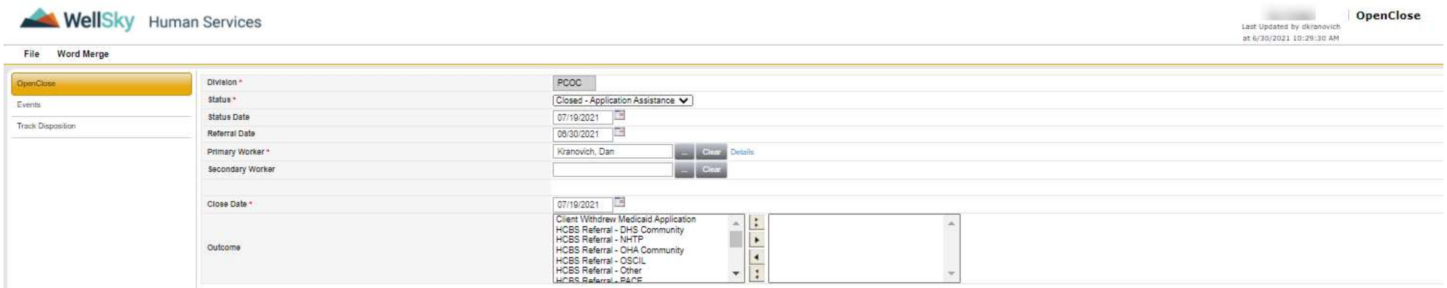
OpenClose List Page

9. Select value from the Status dropdown list.
10. A message will display. Click OK.



OpenClose Message with Status = Closed Value

11. The page will refresh with Close Date and Outcome fields displaying on the page.
12. Select value(s) for the Outcome field.



OpenClose Details Page

13. Select **Save and Close OpenClose** from File menu.

## Training Notes